|  |  |
| --- | --- |
|  | Request for Proposal  *for a Learning Management System* |

Month, 202\_\_

[logo of Issuing Orgnaization]

[name of Issuing Organization]

[URL for Issuing Organization]

**RFP Process Manager**

**[Replace with appropriate info]**

Tagoras, Inc.

[www.tagoras.com](http://www.tagoras.com)

Jeff Cobb

managing director

t: 919.201.7460

e: jcobb@tagoras.com

Table of Contents

Overview 3

IO Background 3

Current Situation 3

Project Focus and Scope 5

Submission Process 6

Proposal Format 6

Schedule for Evaluation Process 6

Proposal Consideration and Evaluation 6

Contact Information 7

|  |
| --- |
| This document is based upon the Tagoras Tech Selector and is made available under a [Creative Commons Attribution-NonCommercial-ShareAlike 4.0 International License](https://creativecommons.org/licenses/by-nc-sa/4.0/). As a condition of use, this notice may not be removed from this document. |

Overview

T

he Issuing Organization (IO) [**Replace throughout with the name of your organization/company]** is seeking a vendor-partner to support management and delivery of place-based, live online, and on-demand online education through a learning management system. This document provides information about IO’s current educational initiatives and the type of solution it seeks.

IO Background

**[Provide concise, basic background on your organization/company]**

The Issuing Organization (IO) is the leading association for clinical physicians and other providers dedicated to the comprehensive medical treatment of patients affected by [a particular disorder] and associated conditions. IO currently has more than [x] members, many of whom also hold certification from [an American board of medicine]. Overall, the organization has experienced steady growth in recent years as interest in [a particular disorder]-related medicine among physicians and the general public has increased.

IO provides continuing medical education (CME) and training for the medical management of [a particular disorder]. This education includes multidisciplinary techniques and a continuum of care—ranging from dietary changes to physical activity to behavior modification to medications—to assist the physician in treating patients affected by [a particular disorder] and associated conditions.

More about IO can be found on the organization’s Web site at [URL].

Current Situation

**[Provide a concise overview of the current situation for your learning business and the objectives you aim to achieve by bringing in a new learning platform.]**

As suggested above, education is one of the key means used by IO to advance its mission and serve its members. The organization currently offers educational programs in a variety of formats, including biannual conferences, one-day seminars, and Webinars. Currently, the primary form of digital educational content is lectures captured from the biannual conferences and distributed via DVD or CD. IO sees a significant opportunity for streamlining and scaling its distribution of recorded content. The learning management system (LMS) sought will also provide an opportunity to dramatically simplify and reduce the labor intensity associated with its current approach to Webinars. Finally, IO anticipates that the growing recognition of [a particular disorder] medicine as a specialty will lead to a demand for self-assessment and other products related to maintenance of certification (MOC).

The purpose of this request for proposal (RFP) is to help IO identify the vendor best suited to meet its needs. Some of the key objectives that IO hopes to achieve by implementing a learning management system include the following

* **Provide a clear, attractive, user-friendly experience for end users.**IO places a high priority on the end user environment being as user-friendly as possible. Users should be able to find and access content through a combination of clearly structured navigation menus and well-indexed search options. In general, it should be possible for users to access resources with as few clicks as possible and always maintain a clear sense of how to get from one area of the system to another.
* **Support multiple learning formats as well as blended learning experiences and manage the issuance of continuing education credit.**  
  The LMS must enable IO to deliver, and users to access, multiple types of learning within a single, unified environment. Formats would include (but not necessarily be limited to) classroom-based sessions, live and recorded Webinars, video talks (synched with PPT), on-demand online courses, and learning experiences that combine each of these formats. It should also be possible to combine discussion boards and other collaborative tools with any of these formats as well as to communicate easily with users via e-mail, as needed. It needs to be possible to offer and manage CME credit for any course delivered through the system, issue certificates, and provide users with access to a transcript and downloadable certificates.
* **Reduce administrative burden through a more cohesive, centralized approach to manage learning and knowledge assets.**  
  The administration of Webinars is, in particular, a challenge for IO under its current set-up. Registration, resources, presentation of content, evaluation, and reporting are all handled by different technologies, making it difficult to present a cohesive experience to end users and to enable IO administrators to manage and track participation. In general, IO prefers an LMS that can help, to the greatest extent possible, consolidate the management of learning content into a single system and improve efficiency across the entire flow of content configuration and delivery for both online and classroom-based learning activities.
* **Improve IO’s abilities to access and report on meaningful data about the member education experience and engagement levels.**Data for reporting on IO education currently resides in multiple places and often must be manipulated manually (e.g., in Excel). As a result, it is difficult to cross-tab data according to basic filters like demographic information and to get clear visibility into how learners are engaging with IO education. The new LMS should help IO better track usage of documents, recorded Webinars, discussion forums, and other learning resources. It should also provide—through the integrations indicated in the next bullet—for detailed reporting based on data associated with member/customer profiles. The system should provide user-friendly “dashboard” type approaches to viewing data and make it easy to export key data from the system so that it can be manipulated and shared as needed.
* **Support seamless integration with other key IO systems and external resources.**IO uses Avectra netFORUM Pro as its membership management system and Joomla as its Web content management system (though IO is not bound to Joomla as a CMS solution). It is expected that the LMS would integrate as necessary with the user profiles maintained in Avectra and would send and receive data as possible to support a cohesive user experience during log-in, the e-commerce process, and as completion and credit data for learning activities is generated. The LMS would ideally have interfaces for facilitating the transmission of PARS data to ACCME.
* **Support the rapid growth of IO’s education business, online and off.**In general, IO sees implementation of a new LMS as a significant step towards more efficient operations as well as improved ways to serve and engage current customers, reach prospective customers, and generate additional revenue. IO is interested in an LMS with features that support cross-promotion of related products and other forms of suggestive selling and marketing.

In addition to the above points, IO wants to feel confident the system it implements—and the company behind the system—are positioned to keep evolving and responding to new trends and developments in learning and professional development, in general, as well as in the health and medical professions, specifically.

Project Focus and Scope

**[Replace with relevant details for your focus and scope.]**

IO is pursuing license and implementation of a platform to achieve meeting the requirements articulated in this RFP and meet the objectives above.

It is expected that the LMS will serve as one of a range of systems—including, but not limited to, Abila netFORUM Pro and a Webinar platform—that comprise the overall learner experience. The level of integration with each of these systems will need to be determined in collaboration with the selected vendor, *but preference will be given to vendors who can articulate a compelling vision for integration as part of this RFP process.*

IO expects to contract with a vendor by the end of Q\_\_ \_\_\_\_ and then work with the vendor to fully implement the LMS, including integration with its current systems and transfer of user data and configuration of all current offerings into the new system, by \_\_\_\_\_\_\_\_.

Submission Process

T

his section provides details about how to submit your proposal, what it should include, IO’s anticipated timeline for evaluating the responses it receives, and contact information for questions and submissions.

Proposal Format

A complete proposal should contain the following elements:

* A **brief cover letter** stating why you want to partner with IO and why you feel your company is particularly suited to meet the objectives articulated by IO. Please also state in the cover letter that your proposal will remain valid for at least 90 days.
* Appropriately detailed responses to each of the four tabs in the accompanying Excel workbook:
  + LMS Requirements
  + Company and LMS Info
  + Costs
  + References

PDF versions of these documents may be submitted if desired, but, to facilitate organizing and comparing the responses received, **you must submit an original Word document for the cover letter and the Excel file with your responses added where indicated**. The completed documents, along with any supporting materials, should be sent to the contact listed below.

If you have standard informational materials you would like to include in addition to the requested documents, please feel free to include those as separate attachments. (Please do not make them part of your cover letter.)

Schedule for Evaluation Process

IO plans to adhere to the following timeline in selecting an LMS provider:

* RFP distributed to vendors November 6, 20\_\_
* Intent-to-respond received by IO November 14, 20\_\_
* Deadline for RFP responses November 25, 20\_\_
* Review of proposals by IO By December 5, 20\_\_
* Invitations for formal presentations December 8, 2018
* Initial vendor demonstrations/presentations Week of December 15, 20\_\_
* Follow-up demonstrations/presentations Early-to-mid January, 20\_\_
* Vendor notification By end of February, 20\_\_

Questions may be submitted at any point during the process, and each company’s questions will be responded to individually—that is, a group e-mail with responses to all questions submitted will ***not*** be sent out.

Proposal Consideration and Evaluation

IO asserts its right to reject any and all proposals, to award a contract to other than the low bidder, and to make an award without further discussion to bidders that were not selected. IO also claims no responsibility for costs to vendors for proposal preparation or submission and requires that the selected vendor must agree in writing to adhere to IO’s intellectual property, conflict of interest, and confidentiality policies.

IO anticipates awarding a contract to the vendor whose expertise and technical and cost proposal demonstrate that the vendor would be most advantageous to meeting IO’s objectives.

IO will select the bidder whose proposal and presentation reflect the following:

* A clear understanding of IO’s needs and strategic goals
* The expertise and technical capabilities to meet the majority of IO’s needs
* Project management and pricing that aligns with the value to be provided

Additional factors IO will consider in the selection of the bidders include the following:

* Experience working with similar medical specialty organizations
* Experience working with organizations moving from an existing LMS
* Organizational resources
* References

Contact Information

All questions, an indication of your intent to respond, and final proposals should be submitted to the RFP manager:

**[Replace with appropriate info]**

Jeff Cobb  
Tagoras, Inc.  
[jcobb@tagoras.com](mailto:jcobb@tagoras.com)  
919.201.7460