

Session # 403– Creating Effective and Selective E-Learning RFPs

Desired Knowledge or Experience: Working knowledge of e-learning terms and concepts as well as an understanding the basic elements of a business proposal

Objectives: By the end of this session you'll be able to:

1. Apply a proven methodology for designing an e-learning RFP.
2. Develop explicit, accurate requirements.
3. Streamline the vendor selection process.

Your Instructor: Karl M. Kapp, Ed.D., CFPIM, CIRM, is a scholar, consultant, and expert on the convergence of learning, technology and business operations. His background teaching e-learning classes, knowledge of adult learning theory, and experience training CEOs and line staff provide him with a unique perspective on organizational learning.

Karl works as a learning consultant helping organizations to develop e-learning strategies, choose Learning Management Systems (LMS), create winning e-learning RFPs, build learning business cases, and evaluate the impact of learning. He also works with e-learning vendor organizations providing expert insight into product directions, market trends, and winning proposal strategies.

Karl understands how to promote effective learning within an organization. He received his Doctorate of Education in Instructional Design at the University of Pittsburgh in Pittsburgh, PA. The field of Instructional Design focuses on the systematic design, development, delivery, implementation and evaluation of instruction.

As Assistant Director of Bloomsburg University's Institute for Interactive Technologies (IIT), Bloomsburg, PA, Karl helps organizations such as Aetna, CIGNA Healthcare, Toys "R" Us, the Pennsylvania Department of Public Welfare, Kellogg's, Merck, BMS and L'OREAL understand how e-learning technologies impact employee productivity and learning.

As Professor of Instructional Technology at Bloomsburg University, Karl teaches a unique class. Students are formed into "companies," write a business plan, receive an e-learning Request for Proposal (RFP), respond with a proposal, develop a working prototype, and present their solution to representatives from various corporations.

Karl has written an informative book containing key information about writing and responding to RFPs titled ***Winning E-Learning Proposals: The Art of Development and Delivery***. He is currently working on his third book titled "**Gadgets, Games and Gizmos for Learning: Tools for Transferring Knowledge from the Boomers to the Gamers**" with Pfeiffer which will be released in April 2007.

Karl is committed to helping organization's develop a strategic, enterprisewide approach to organizational learning. He believes that effective education and training are the keys to increased productivity and profitability.

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Slide 1

Creating an Effective and Selective E-Learning RFP

Presented by:
Karl M. Kapp, Ed.D.,
 Author of Winning E-Learning Proposals

Assistant Director,
 Institute for Interactive Technologies
 kkapp@bloomu.edu
 Professor, Instructional Technology
 Bloomsburg University




Slide 2

Objectives/Background

- ◆ You will learn how to
 - ➔ Apply a proven methodology for designing an e-learning RFP.
 - ➔ Develop explicit, accurate requirements.
 - ➔ Streamline the vendor selection process.

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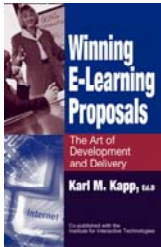


Slide 3

Resources

Slides, Free White Papers on RFPs, Links and Sample RFP. All located at:
www.karlkapp.com

➔ *Winning E-Learning Proposals: The Art of Development & Delivery*




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Why...

- ◆ **LMS**
 - ½ Million Dollar Decision
 - Run Training and Development for Next 5-10 Years
 - 50% of companies that own an LMS from a vendor that no longer exists
- ◆ **Custom Development**
 - Expensive
 - Meeting a Business Need
 - Lots of E-Learning Garbage
- ◆ **Off-The-Shelf**
 - Lots of E-Learning Garbage
 - Must Perform as Indicated
 - Learners Need to Partake of the E-Learning




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Poor e-learning start with poor RFPs!


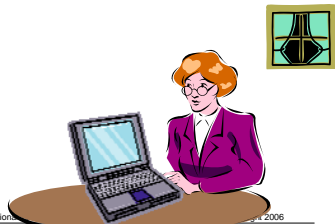


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How is an RFP Typically Written?




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Problems?

- ◆ Poorly Written
- ◆ Illogical
- ◆ Provide Too Little Detail
- ◆ Not Imaginative
- ◆ Poorly Scoped
- ◆ Don't Address a Business Need
- ◆ Don't Follow a Defined Process




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Defined Process Methodology

◆ Appoint Selection Team	◆ Receive Proposals
◆ Determine Needs and Readiness	◆ Evaluate Proposals
◆ Record Needs and Clarify Drivers	◆ Arrange Vendor Presentations
◆ Write RFP	◆ Second Narrowing of Vendor Pool
◆ Develop Evaluation Criteria	◆ Site Visits, Background Checks
◆ Review RFP with Legal/Procurement	◆ Select Finalist
◆ Identify/Contact Vendors	◆ Finalize Arrangement
◆ Send RFP to Vendors	





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Starting Point

- ◆ Appoint a Selection Team


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10

Are the Right People on the Team?

- ◆ **Who is Should be on the team?**
 - Information technology person
 - Upper level business unit directors
 - Ultimate end user of e-learning
 - Representative of Training Team
 - Representative of end-user population
 - Executive Sponsor
 - Legal (as a consultant)
 - Procurement (as a consultant)
 - Outside Assistance (consultant)





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11

Determine Needs and Readiness

- ◆ **Readiness Assessment**
 - Financial
 - Technological
 - Cultural
 - Learning



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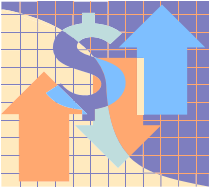
Checklist for a Selective and Effective Winning E-Learning RFP

When creating an e-learning proposal, you must first examine certain elements and key requirements. An awareness of these elements will help you to develop a savvy RFP.

Have you identified the business need driving the demand for e-learning?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have you conducted a proper analysis of your information technology infrastructure?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have you analyzed the current corporate culture to determine the e-learning readiness?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have you operationally defined terms like “quality” and “engaging content”?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have you determine the types and level of multimedia to be involved?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have you developed objective selection criteria to discriminate among vendors?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have you clearly listed the objective evaluation criteria?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have you determined if the training is synchronous, asynchronous or a blend?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have you determined the desired level of initial customer support for your e-learning?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have you determined a method of “rolling out” the e-learning?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Can the vendor help?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have you examined your RFP for inconsistencies and eliminated them?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have you eliminated unclear or vague terminology in the RFP?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have you clearly defined the deliverables and tied them to the time line?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have you defined any integration issues within the LMS or LCMS implementation?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have you stated what third-party packages must interface with your learning system?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have you taken into account the “legal lag”?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have you carefully estimated the number of initial learners?	Yes <input type="checkbox"/>	No <input type="checkbox"/>


Slide
12

Financial




- ◆ **Define the Metrics**
 - **Cost/Benefit**
 - **Cost Avoidance**
 - **Cost Savings**
 - **Performance Enhancement**
 - **Examine difficult to quantify benefits**

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Technical




- ◆ **Current infrastructure**
- ◆ **Future infrastructure**
- ◆ **Amount of internal IT support**
- ◆ **Conflicts for IT resources**

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14

Cultural




- ◆ **Impact of shift**
- ◆ **Learning “ownership”**
- ◆ **Comfort with computers**
- ◆ **Managerial support**
- ◆ **When will learning take place**
- ◆ **Who commissions the e-learning**

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15

Learning



- ◆ What is the content to be placed online?
- ◆ What behaviors do we want to change?
- ◆ How are our learners used to learning?

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16

Record Needs and Clarify Drivers

Objectives ABC Bank's Big Five E-Learning

- ◆ •Accurate tracking and reporting capabilities.
- ◆ •Generate higher ROI on learning resources.
- ◆ •Tie learning to job performance.
- ◆ •Offer equal opportunity of world class learning solutions to all team members.
- ◆ •Standardize delivery and curriculum.

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17

Write RFP



Deliverable	Date
Confidentiality Statement Due	05/01/04
Proposal Issued to Vendors	05/05/04
Proposal Due	06/01/04
Presentation	07/10/04

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18

RFP Outline



- Cover Page
-RFP Title, Number, Due/Issue Date, Contact Info.
- Project Overview
- Submission Process and Timeline
- Organization of Proposal
- Orientation to Business and Strategy
-Performance/Business Objectives to be Addressed
- Audience Description
- Delivery Environment
- Technology Infrastructure
- Content
- Design Parameters and Media



Slide
19

RFP Outline

- Quality Assurance
- Administrative/Maintenance Issues
- Implementation Schedule
- Available Materials/Resources
- Contract/Legal Issues



RFP Outline

Cover Page

-RFP Title, Number, Due/Issue Date, Contact Info.

Invitation to Bid

-Project Overview
-Submission Process and Timeline
-Organization of Proposal

The Business Need

-Orientation to Business and Strategy (Context)
-Performance/Business Objectives to be Addressed

Learning Environment

-Audience Description
-Delivery Environment
-Technology Infrastructure
-Organizational Culture

Proposed Solution

-Content
-Design Parameters and Media
-Quality Assurance
-Administrative/Maintenance Issues
-Implementation Schedule
-Required Proposal Format

Available Resources

-Materials
-Staff

Contract/Legal Issues

-Ownership, IP, Disclosures

Appendices

Source: Based on work of Stan Malcom at <http://www.performance-vision.com/rfpshell.doc>

Slide
20

Evaluation Criteria

Key:
 YSP= Available as part of the standard package.
 YWC= Available but requires customization.
 FG= Available in a future release (please provide date).
 No= Not available currently or in the foreseeable future, not a typical or easy customization.

Define Curriculum by Group/Division						
Define Curriculum by Sub-Group			X Q1 2005			In Development
Sort & Filter Catalog to Build a Curriculum for a Specific Group or Learner			X			

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21

Evaluation Criteria

Key:
 YSP= Available as part of the standard package.
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Feature	YSP	YWC	FG Date	No	Comment
Define Curriculum by Group/Division	X				Standard
Define Curriculum by Sub-Group			X Q1 2005		In Development
Sort & Filter Catalog to Build a Curriculum for a Specific Group or Learner	X				
Sort & Filter Catalog to Build a Curriculum for a Specific Group or Learner		X			

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22

Write RFP

- ◆ **Include Overview of the Project**
- ◆ **Submission Process and Timeline**
- ◆ **Clearly Describe Selection Criteria**
- ◆ **Identify**
 - ➔ **Technology Infrastructure**
 - ➔ **Audience**
 - ➔ **Specific Needs**
- ◆ **Be clear, descriptive and precise**




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23

Write RFP

- ◆ Pick the right team
- ◆ Tie to Readiness Assessment
- ◆ Precise description of your needs
- ◆ Evaluate your assumptions
- ◆ Proofread RFP for consistency



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24

Review RFP with Legal/Procurement

- ◆ Is Timeframe Realistic?
- ◆ Are Proper Processes Being Followed?
- ◆ Have Other Groups Purchased or Considering Purchasing E-Learning or LMS?
- ◆ Are Confidentiality Statements in Order?





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Receive Proposals

- ◆ How Do You Want Them?
 - PDF—means you print (may lose color graphics).
 - Bound—means you carry them and require correct amount.
- ◆ Provide Team with Enough Reading Time
- ◆ Usually Takes 2 or 3 Reads




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26

Evaluate Proposals

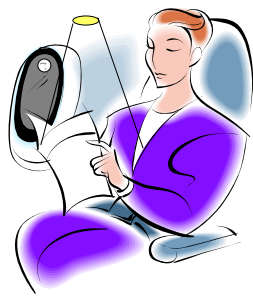


- ◆ **Develop Objective Criteria**
 - Allow for subjective options
- ◆ **Quantify Evaluations**
- ◆ **Teach the Team to Evaluate**
 - Strive for Inter-rater Reliability
- ◆ **Consider Likert-Type Scales or Adding more value to some criteria.**

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27

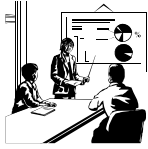
Proposal Evaluation Process



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Arrange Vendor Presentations




- ◆ **Develop an Agenda**
- ◆ **Look for Listening Skills and Flexibility**
- ◆ **Create Evaluation Sheets**
- ◆ **Ensure All Topics are Covered**
 - Provide a Script
 - Provide a List of Question to Address
- ◆ **You Need More Time Than You Think**

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29

Narrow List of Vendors

- ◆ Tell Vendors Quickly of Your Decision
- ◆ Explain “Why”
 - Could give second chance
 - Ends constant revisits
- ◆ Tally Scores and Objective Criteria but Discuss/Document Intangibles

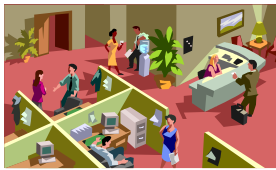


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30

Site Visits, Background Checks

- ◆ Vendor Provided
 - Follow Vendor Protocol
 - Surprisingly Honest
- ◆ Not Vendor Provided
 - Professional Groups
 - Industry Peers
 - Local Colleges, Universities
 - Chamber of Commerce
- ◆ Questions
 - Implementation
 - Hosting
 - Customer Service
 - Adherence to Timelines
 - Unanticipated Costs
 - Best Practices



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31

Select Finalist

- ◆ Document Reason for Selection
- ◆ Share the Decision with Executives
- ◆ Let Finalist Know
- ◆ Let Legal Department Know
- ◆ Begin Negotiations
 - Legal Lag
 - Bring Together Lines of Business and Legal Department Representatives
- ◆ Finalize Agreement

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32

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33

Then the Fun Begins...

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34

Implementation...but that's another story

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35

Questions

Slides, Free White Papers on RFPs, Links and Sample RFP. All located at:
www.karlkapp.com

→ *Winning E-Learning Proposals:
The Art of Development & Delivery*

