

# LMS/LCMS Selection Process Templates

## Overview

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### Introduction

The selection of a Learning Management and Learning Content Management Systems is an important decision for any organization. This document provides several templates to provide a consistent approach to your selection. These tools are provided in conjunction with the eLearning Guild presentation.

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### Contents

This document contains the following topics:

| <b>Topic</b>   | <b>See Page</b> |
|--|-----------------|
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# Request For Proposal: LMS/LCMS

## Overview

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### Introduction

*ABC Company* is seeking to purchase an integrated Learning Management System/Learning Content Management System (LMS/LCMS) to incorporate into our current business structure to offer world class learning solutions to all our team members. We desire to have the following components in the proposed solution:

- Learner management functions (learner registration, reporting capability, wait-lists, Email notifications)
  - Content management functions (asset management, meta-tag searches)
  - Course authoring functionality
  - Virtual classroom delivery capabilities for real-time instruction
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### Background

Brief background about your company's organization.

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### In this Document

This document contains the following sections:

| Sections  | See Page |
|---|----------|
| Schedule and Due Dates                                |          |
| ABC Company's Requirements                            |          |
| RFP Terms   |          |
| Overview of Required Proposal Outline                 |          |
| Detailed Required Proposal Outline                    |          |
| Appendix A: ABC Company's List of System Requirements |          |
| Appendix B: Intent to Respond Form                    |          |
| Appendix C: ABC's Terms and Conditions Form           |          |

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## Schedule and Due Dates

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Below are the estimated dates for all of the tasks outlined in this Request for Proposal *ABC Company* will make every effort to adhere to these dates, however, the issuing of this table does not bind *ABC Company* to any of these dates which may change at *ABC Company*'s discretion.

| <b>Item</b>   | <b>Due Date</b> | <b>How Delivered</b> | <b>Responsible Party</b> |
|---|-----------------|----------------------|--------------------------|
| RFP Issued  | 2/20/04         | Email                | <i>ABC Company</i>       |
| Intent to Respond due to <i>ABC Company</i> (Appendix B)  | 2/27/04         | Fax                  | Vendor(s)                |
| Written questions for bidders conference due  | 3/5/04          | Email                | Vendor(s)                |
| Response to questions for bidders distributed   | 3/12/04         | Email                | <i>ABC Company</i>       |
| Proposal due<br><br>*Must include: Appendix C:<br><i>ABC Company</i> Terms and<br>Minimum Conditions Form | 3/19/04         | Email                | Vendor(s)                |
| Notification of Selection Status  | 4/2/04          | Email                | <i>ABC Company</i>       |

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## ABC Company's Requirements

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|                            |  |
|----------------------------|--|
| <b>Objectives</b>          | Overall objectives of the desired technology.  |
| <b>Pricing</b>             | General statement about pricing being fair and competitive.  |
| <b>Evaluation Criteria</b> | List the primary areas the responses will be evaluated on such as functionality, company strength, price, etc. |
| <b>RFP Scope</b>           | High-level review of the request, the learners it will support, and general technology requirements.           |

## RFP Term

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**Confidentiality and Ownership**

Statement that the RFP is confidential and its contents should not be shared with others. Statement that RFP should be returned in vendor decides not to respond.

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**Incurred Costs**

All costs and expenses associated with the preparation of vendors' responses to this RFP shall be borne solely by the vendor.

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**Intent to Respond**

All recipients of this RFP shall return the "Intent to Respond" form enclosed as Appendix B stating their intentions with regard to this RFP. This form must be completed and faxed, no later than **MM/DD/YY**, to ABC Company RFP Representatives listed below. Should the vendor decide against responding to this RFP, please return this document via Email and all accompanying materials to the RFP Representatives listed below.

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**ABC Company RFP Representative**

For the purpose of this RFP, the ABC Company RFP Representatives and their contact information are:  
Jane Doe - email address

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**Offer and Period of Validity of RFP Response**

Information about the offer and period of validity, such as: This RFP shall not be deemed an offer. Vendor's proposal valid for 180 days from submission. Vendor's proposal constitutes an offer and wording can be incorporated in contract. .

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**Questions about RFP and Restriction on Contact**

Indicate how questions about the RFP should be addressed. In writing, phone call, etc. Explain when questions are due and how responses to vendor questions will be handled.

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**Authority to Sign**

Proposals **must** be signed by the person or persons expressly authorized to act on the vendor's behalf to bind it to the terms and conditions of the proposal and to negotiate with ABC Company. Based upon this notice, ABC Company shall in good faith assume the apparent authority of such signer(s) but reserves the right to request satisfactory evidence of such authority.

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## RFP Terms, Cont'd.

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**Review and  
Acceptance**

Details about ABC Company's review and acceptance of proposals.

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**Award**

Information regarding when the deal will be awarded and that ABC Company has the right to award the contact at any time.

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**Response  
Format**

Explanation of how the vendors should respond. We asked for electronic responses in a particular outline/format. We basically indicated that if the RFP was not in that format, it would not be considered.

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**Submission  
Instructions  
and Checklist**

Date and time the RFP is due and to whom it should be sent.

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# Overview of Required Proposal Outline

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The following is an outline of the various sections that will be required within the RFP. A detailed description of the requirements of each section is contained on the pages following this overview.

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|                    |  |
|--------------------|--|
| <b>Preface</b>     | Signed Letter of Transmittal<br>Signed Terms and Minimum Condition Form (Appendix C of this proposal)<br>Table of Contents |
| <b>Section I</b>   | Executive Summary  |
| <b>Section II</b>  | Understanding the Need   |
| <b>Section III</b> | Solution: Needed Features and Requirements   |
| <b>Section IV</b>  | Solution: Technical Requirements   |
| <b>Section V</b>   | Budget   |
| <b>Section VI</b>  | Company Background and Reference   |
| <b>Section VII</b> | Customer Support and Warranty  |

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**Note:**

- ✓ After this section, we provided more specific information for each of the sections described above.

# Appendix A: ABC Company's Requirements

## Features List

Below are the features requested in the Sovereign LMS/LCMS Software

**Key:**

**YSP= Yes, this feature is available as part of the standard package**

**YWC=Yes, this feature is available but requires customization**

**FR= This feature will be available in a future release (please provide date)**

**No= This feature is not available currently or in the foreseeable future, not a typical or easy customization**

**NOTE:** Features listed on this chart provide the categories of items and one or two samples. This is to provide a guideline and not meant to be a comprehensive list.

| <i>Features</i>  | YSP | YWC | FR<br>Estimated<br>Date | No |
|--|-----|-----|-------------------------|----|
| Infrastructure   |     |     |                         |    |
| Content format will allow for simple transfer to/from another vendor's platform                    |     |     |                         |    |
| Courses can be taken using a PC running Windows 2000/NT supporting IE 5.0 and appropriate plug-ins |     |     |                         |    |
| <i>List other additional items</i>   |     |     |                         |    |
| Collaboration  |     |     |                         |    |
| Bulletin Board General Users   |     |     |                         |    |
| <i>List other additional items</i>   |     |     |                         |    |
| Curriculum and Certification Management  |     |     |                         |    |
| Ability to define curriculum by group  |     |     |                         |    |
| Ability to define curriculum by sub-group, for example, by position and title                      |     |     |                         |    |
| <i>List other additional items</i>   |     |     |                         |    |
| Database   |     |     |                         |    |
| Compatible with Industry leading databases (Oracle, MS SQL)  |     |     |                         |    |
| <i>List other additional items</i>   |     |     |                         |    |
| Customization  |     |     |                         |    |
| Customizable user interface  |     |     |                         |    |
| Calendars can be formatted horizontally or vertically  |     |     |                         |    |
| <i>List other additional items</i>   |     |     |                         |    |
| Distribution/Deployment  |     |     |                         |    |
| Allows printing of teaching materials for classroom-based training                                 |     |     |                         |    |
| Audio, video, graphics, animations, and text objects are centrally stored and can be reused        |     |     |                         |    |

*Continued on next page*

## Appendix A: ABC Company's Requirements, Continued

| <i>Features</i>  | YSP | YWD | FR<br>Estimated<br>Date | No |
|--|-----|-----|-------------------------|----|
| Financial  |     |     |                         |    |
| Track cost per student   |     |     |                         |    |
| Internal cost center tracking  |     |     |                         |    |
| <i>List other additional items</i>   |     |     |                         |    |
| Information Management   |     |     |                         |    |
| Record attendance at outside seminars  |     |     |                         |    |
| Load historical training data from other systems                                 |     |     |                         |    |
| <i>List other additional items</i>   |     |     |                         |    |
| Integration  |     |     |                         |    |
| People Soft systems integration  |     |     |                         |    |
| Learner Functions  |     |     |                         |    |
| Bookmark course and return later   |     |     |                         |    |
| Students can print their progress and training history                           |     |     |                         |    |
| <i>List other additional items</i>   |     |     |                         |    |
| Notification/Registration  |     |     |                         |    |
| Automatic e-mailing to Students and Managers                                     |     |     |                         |    |
| Notification to management if employees don't enroll in course by a certain date |     |     |                         |    |
| <i>List other additional items</i>   |     |     |                         |    |
| Reporting  |     |     |                         |    |
| Student progress reports   |     |     |                         |    |
| Report templates   |     |     |                         |    |
| <i>List other additional items</i>   |     |     |                         |    |
| Resources  |     |     |                         |    |
| Glossary of terms  |     |     |                         |    |
| Frequently Asked Questions (FAQ)   |     |     |                         |    |
| <i>List other additional items</i>   |     |     |                         |    |
| Support  |     |     |                         |    |
| Support services include monthly public training                                 |     |     |                         |    |
| 24 hour Technical support  |     |     |                         |    |
| <i>List other additional items</i>   |     |     |                         |    |
| Schedule and Manage Resources  |     |     |                         |    |
| Manage training materials in a (physical) library                                |     |     |                         |    |
| Courses can be scheduled on non-contiguous days                                  |     |     |                         |    |
| <i>List other additional items</i>   |     |     |                         |    |
| Testing  |     |     |                         |    |
| Online course evaluations  |     |     |                         |    |

|  |  |  |  |  |
|--|--|--|--|--|
| Online student evaluations                             |  |  |  |  |
| Pre and post assessments                               |  |  |  |  |
| 24 hour Technical support                              |  |  |  |  |
| <i>List other additional items</i>                     |  |  |  |  |
| Other  |  |  |  |  |
| MS Windows-type interface and navigational conventions |  |  |  |  |
| Media objects can be shared among courses              |  |  |  |  |
| <i>List other additional items</i>                     |  |  |  |  |

## Appendix B: Intent to Respond

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Intent to Respond

Fax no later than **MM/DD/YY** to the ABC Company Representative:

|                |
|----------------|
| Jane Doe       |
| Fax:<br>Email: |

Please indicate your intent to respond as follows:

\_\_\_\_\_ Yes, will respond to RFP by 5pm on **MM/DD/YY**

\_\_\_\_\_ No, intent to respond to RFP. Will return RFP documents to both Email addresses as indicated above.

Please complete the following information prior to faxing to the ABC Company RFP Representatives.

Company Name \_\_\_\_\_

Contact Person at Above Company (Please Print) \_\_\_\_\_

Signature of Contact Person

Date

\_\_\_\_\_

\_\_\_\_\_

# Appendix C: ABC Company Terms and Minimum Conditions Form

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## ABC Company Terms and Minimum Conditions Form

*This form must be completed, signed and returned in order for your proposal to be considered*

This form lists the company's confidentiality and other minimum terms you want agreed upon prior to the Vendor's proposal.

## RFP RESPONSE EVALUATION TOOL

| Vendor                          | Year 1 Price | Yearly Maint.                                | Implement-ation                                   | Software Included  | Features +/-   | Customi-zations | “No’s” | Futures | Business Need | Team Temp |
|---------------------------------|--------------|--|---|--|--|-----------------|--------|---------|---------------|-----------|
| Vendor A                        | \$790,000.   | \$570,000.                                   | Approx. \$100,000 (estimate.. exact not provided) | <ul style="list-style-type: none"> <li>• LMS</li> <li>• CMS</li> </ul>   | <ul style="list-style-type: none"> <li>• Lacked many desirable features.</li> <li>• Not integrated solution</li> </ul>   | 3               | 9      | 5       | 1             | 1         |
| Vendor B                        | \$235,000.   | \$270,000. (including \$15,000 24X7 support) | \$100,000.  | <ul style="list-style-type: none"> <li>• LMS</li> <li>• LCMS</li> <li>• Virtual Classroom</li> </ul>                           | <ul style="list-style-type: none"> <li>• Totally integrated solution</li> <li>• Implementation support comprehensive, including training, strategic planning, etc.</li> <li>• Concerns re: VCS user maximums</li> <li>• Extensive experience integrating with HRIS systems, including PeopleSoft (50 times)</li> </ul> | 0               | 3      | 6       | 5             | 5         |
| Vendor C                        | \$450,000.   | \$150,000.                                   | \$100,000.  | <ul style="list-style-type: none"> <li>• LMS</li> <li>• Testing System</li> <li>• LCMS</li> <li>• Virtual Classroom</li> </ul> | <ul style="list-style-type: none"> <li>• Learning Communities, Notebook, Discussion Boards, and notification to mgr if don’t enroll are customization.</li> <li>• Extensive experience integrating with PeopleSoft</li> <li>• Major releases only every 3 years.</li> </ul>  | 20              | 1      | 0       | 1             | 2         |
| Additional rows for each vendor |              |  |   |  |  |                 |        |         |               |           |

## VENDOR PRICING COMPARISON CHART

| <b>Pricing Component</b>                                     | <b>Vendor A</b> | <b>Vendor B</b> | <b>Vendor C</b> | <b>Vendor D</b> | <b>Comments</b> |
|--|-----------------|-----------------|-----------------|-----------------|-----------------|
| Perpetual License  | \$320,000.      | \$200,000.      | \$145,000.      | \$215,000.      |                 |
| Subscription License (if opt for subscription not perpetual) |                 |                 |                 |                 |                 |
| Annual Hosting   | \$500,000.      | \$96,000.       | \$35,000.       | \$50,000.       |                 |
| LCMS   |                 | \$20,000.       |                 | \$18,000.       |                 |
| Other Authoring Tool   |                 |                 | \$26,000.       |                 |                 |
| Initiation Fee   | \$20,000.       |                 |                 |                 |                 |
| Production Support Fee                                       | \$198,000.      |                 |                 |                 |                 |
| Training   |                 |                 | \$11,000.       |                 |                 |
| Installation   |                 |                 | \$16,500.       |                 |                 |
| Implementation   |                 | \$205,000.      |                 | \$100,000.      |                 |
| Virtual Classroom  |                 | \$15,000.       | \$39,000.       |                 |                 |
| Technical Support  |                 |                 | \$10,000.       |                 |                 |
| Extended Support   |                 |                 | \$10,000        |                 |                 |
|  |                 |                 |                 |                 |                 |

# Vendor Demonstration Evaluation Tool – Round 1

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**Company  
Background/  
Strength**

**Items to Consider:**

- Is learning their primary business?
- Number of implementations?
- Number of retail banking customers?
- Do they have any strategic partnerships that may impact us?

**Comments:**

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1 = not very impressive; not very long in the field; uncertain to stability  
2 = somewhat impressive; seems somewhat a solid company  
3 = good company background; solid company  
4 = very good company background; very solid company  
5 = very robust company; excellent

**Vendor Score:** \_\_\_\_\_

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**Corporate  
Culture/Values**

**Do they match our corporate values?**

- Are they committed to their customers?
- Are they committed to quality?
- Have they researched our culture and operations?
- Have they researched our industry?
- Have they researched our business and training needs?
- Do they demonstrate a level of preparation for this demonstration?

**Comments:**

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1 = doesn't match our corporate values  
2 = a few values are similar but the majority are not  
3 = average fit to our culture; could possibly work together  
4 = very good match; solid company; not a 1for1 match  
5 = excellent match between Sovereign and vendor

**Vendor Score:** \_\_\_\_\_

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*Continued on next page*

# Vendor Demonstration Evaluation Tool – Round 1 , Continued

**Demonstration  
Criteria**

**Items to Consider: (see text box for scoring)**

**Set-Up of Learning Program in LMS**

**Vendor Score** \_\_\_\_\_

- Demonstrate adding learning program parameters
- Create Admin/Security Rights

**Design & Development of Course**

**Vendor Score** \_\_\_\_\_

- Develop asynchronous new course
- Develop course to use in a synchronous environment.
- Load existing course.

**Course Delivery**

**Vendor Score** \_\_\_\_\_

- Demonstrate synchronous course delivery
- Demonstrate asynchronous course delivery
- Demonstrate use of job aids in system
- Course Administration

**Illustrate End-User Navigation**

**Vendor Score** \_\_\_\_\_

- Access for first-time user
- End user registration process
- Viewing of student record
- Access and complete a course
- Demonstrate book marking a course and finishing later

**Display Tracking and Reporting**

**Vendor Score** \_\_\_\_\_

- Display the various outputs of reporting
- Demonstrate how raw data can be manipulated
- Customer report output

1 = did not meet requirements  
2 = did meet requirements, but not easy to use; didn't like it  
3 = met minimum requirements; fairly easy to use  
4 = met requirements; easy to use  
5 = met requirements; exceeded my expectations

**Overall Demo Vendor Score:** \_\_\_\_\_ (total items in demo block)

*Continued on next page*

# Vendor Demonstration Evaluation Tool – Round 1, Continued

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## Implementation Process

### Items to Consider:

- Strategic planning of implementation
- Documented knowledge transfer process
- Formal issue escalation and tracking system
- Quality of implementation team

### Comments:

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1 = does not have an implementation process in place  
2 = somewhat difficult implementation process; meets minimum expectations  
3 = simple implementation process; met expectations  
4 = good implementation process; met expectations  
5 = very good implementation process; exceeded expectations

**Vendor Score:** \_\_\_\_\_ (1-5)

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## On-going Customer Support

### Items to Consider:

- Support hours
- On-line and phone helpdesk
- Quality of support team
- Incident tracking system

### Comments:

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1 = does not offer 24/7 ongoing support; did not meet expectations  
2 = offers support at minimum; meets minimum expectations  
3 = offers 24/7 support; meets expectations  
4 = offers 24/7 support; exceeds expectations  
5 = offers 24/7 support; exceeds expectations by cost

**Vendor Score:** \_\_\_\_\_ (1-5)

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*Continued on next page*

## Vendor Demonstration Evaluation Tool – Round 1, Continued

**Overall Impression**

Using a scale of 1-5 (5 being the highest), please rate this vendor based on the overall impression you received from their demonstration. Use the space below for any additional comments.

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|   |
|---|
| <p>1 = did not impressive; does not meet expectations<br/>                 2 = somewhat impressed<br/>                 3 = impressed; good product; met expectations<br/>                 4 = very impressed<br/>                 5 = exceeded expectations; World Class impression</p> |
|---|

**Vendor Score:** \_\_\_\_\_ (1-5)

**Vendor Total Score**

Please transfer your ratings for the vendor from the previous pages to this section. This section serves as a summary of the vendor’s scores.

| Topic                       | “Vendor Score” |
|-----------------------------|----------------|
| Company Background/Strength |                |
| Corporate Culture/Values    |                |
| Demonstration Criteria      |                |
| Implementation Process      |                |
| On-going Customer Support   |                |
| Overall Impression          |                |
| <b>Total Vendor Score</b>   |                |

# Vendor Demo Evaluation Tool – Round 2 – Hands-On Demos

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**General Information**

Vendor Name: \_\_\_\_\_ Your Name: \_\_\_\_\_

Rating Scale for Hands-On Demo:  
5 – Easy, no difficulty  
4 – Somewhat easy, minimal difficulty  
3 – Moderately easy, minimal difficulty  
2 – Not easy to, somewhat difficult  
1 – Not easy, very difficult

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**Set-Up Course**

**Description:**

Establish a course within the learning management system.

**Comments:**

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**Rating:** \_\_\_\_\_

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**Create Course**

**Description:**

Create a course in the LCMS using a template. Include use of graphics and other media.

**Comments:**

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**Rating:** \_\_\_\_\_

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*Continued on next page*

# Vendor Demo Evaluation Tool – Round 2 – Hands-On Demos, Continued

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**Create  
Assessment**

**Description:**  
Create an assessment using the LCMS.

**Comments:**

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**Rating:** \_\_\_\_\_

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**Modify a  
Course**

**Description:**  
Once course has been established, modify some of the content.

**Comments:**

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**Rating:** \_\_\_\_\_

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**Upload an  
Existing Course**

**Description:**  
Upload an existing off-the-shelf course into the LMS.

**Comments:**

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**Rating:** \_\_\_\_\_

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*Continued on next page*

# Vendor Demo Evaluation Tool – Round 2 – Hands-On Demos, Continued

**Create a Report**

**Description:**

Create a report and run the report to show the results

**Comments:**

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**Rating:** \_\_\_\_\_

**Summary Score based on Hands-On Demo**

Please transfer your ratings for the vendor from the previous pages to this section. This section serves as a summary of the vendor's scores.

| Topic                     | Score |
|---------------------------|-------|
| Set-Up Course             |       |
| Create Course             |       |
| Create Assessment         |       |
| Modify Course             |       |
| Upload an Existing Course |       |
| Create a Report           |       |

*Continued on next page*

# Vendor Demo Evaluation Tool – Round 2 – Hands-On Demos, Continued

**Technical  
Review**

**Comments:**

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**Cost Review**

**Comments:**

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**Summary  
Comments**

**Comments:**

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**LMS/LCMS SELECTION  
FINAL VENDOR COMPARISON CHART**

| <b>Feature Functionality</b>   | <b>Vendor A Rating</b> | <b>Vendor A Comments</b> | <b>Vendor B Rating</b> | <b>Vendor B Comments</b> |
|--|------------------------|--------------------------|------------------------|--------------------------|
| Learner – Usability<br>- Look and feel<br>- Ease of registration<br>- Ease of view of student record<br>- Career pathing   |                        |                          |                        |                          |
| Manager – Usability<br>- Look and feel<br>- Manage and monitor performance<br>- Assign courses to staff<br>- View student record   |                        |                          |                        |                          |
| Administrator – Usability<br>- Look and feel<br>- Ease of to set up course<br>- Tracking and reporting functionality<br>- Ease of management of courses (i.e., instructors, facilities, equipment, etc.) |                        |                          |                        |                          |
| Designers/Developers – Usability<br>- Look and feel<br>- Template driven<br>- Ease of creation of learning modules<br>- Ease of modification of modules<br>- Ease to incorporate vendor modules          |                        |                          |                        |                          |
| Support (i.e., customer service, technical, hosting) – Usability<br>- Availability<br>- Experience<br>- Help desk for hosting arrangement  |                        |                          |                        |                          |
| Cost<br>- Value to initial investment<br>- Ongoing annual costs  |                        |                          |                        |                          |

