

How to Write an RFP for e-Learning Services

Including a Customizable RFP Template



What is an RFP?

How can you narrow the list of possibilities before contracting for services? How can you ensure that your organization's business needs will be met? One solution is to write and distribute a Request for Proposal (RFP) in the marketplace.

An RFP is a document produced by a company seeking goods and/or services and distributed to prospective vendors. Vendors then provide proposals based on the criteria specified within the RFP. A well-written RFP will outline specific information about your organization, the services and products you need, and the specific requirements suppliers must meet in order to win your business. It forces you to identify your business and technical requirements. It also forces the vendor to state in writing to what extent they can meet your requirements.

A written RFP increases market awareness of your organization's needs, thereby increasing the competition to serve those needs and increasing the formality of the relationship between you and the supplier. In short, an RFP places you—the buyer—in control of the desired service levels and related requirements and lets potential vendors know up front that your most important concern is the level of customer service you will receive.

Reasons to Write a Formal Request for Proposal

- To increase competition for your organization's money, which will increase the options and potentially could drive down the cost.
- To identify and select qualified organizations capable of supporting high levels of service in the most cost-effective and administratively efficient manner possible.
- To select stable, organized and efficient organizations interested in developing long-term relationships.
- To award opportunities to the most capable and qualified organization(s)—whose capabilities and experience can support demands and can grow as needs evolve.
- To outline the terms of a formal working agreement that holds both the buyer and the supplier liable to certain terms and conditions—the legalities of the opportunity.

RFPs are a lot of work, but they're worth it. If you are planning on purchasing a learning management system and e-learning courseware that you hope to use for 3 to 5 years, it obviously makes sense to find the vendor or vendors whose products match your needs as closely as possible.

It's certainly easy to take shortcuts. Industry gossip, fancy ad campaigns, anecdotal stories and conversations over lunch might provide you with a few tips. But deciding on an e-learning vendor is much different than using the latest *Consumer Reports* to choose a lawnmower. You need to be educated, and there should be no guessing involved.

How to Write an Effective RFP

The key to getting the best quality services required for your e-learning project is a carefully written RFP.

Top Five Things to Include in Your RFP

1. Your Overall Training Goal

Within your RFP you should include the general business goals which need to be met by the proposed e-learning program. This includes measurements of success—how your organization will determine whether your e-learning initiative has been successful.

2. The Trainees/Audience

Your RFP should also include a brief summary of the roles/jobs of the trainees. This information should include details regarding how job roles and processes are currently taught, and how trainees' responsibilities will change as a result of the introduction of the proposed e-learning program. Be sure to include the number of people—by job category and geographic location—expected to be trained. This type of information will assist vendors in understanding your target audience for whom the program will be developed.

3. State Your Objectives

The objectives within the RFP should describe exactly what the trainees will be required to do as a result of going through the e-learning training program. Each objective should be detailed within the RFP so vendors can better understand the training goals of your proposed e-learning program.

4. Project Details/Specifications

An effective RFP should also include specific details about the project such as:

- Information about your organization's technical infrastructure, end-user hardware, etc.
- Details regarding the training program content required.
- Anticipated project team organization and implementation schedule.
- Budget/schedule criteria.

5. Request for Vendor Suggestions/Input

It's always a useful idea to include a request for feedback from vendors when there are specific needs you aren't sure how to address.

RFP Template

The following RFP template can be used to develop your own request for proposal. You should complete sections A through C yourself in order to provide vendors with enough information to formulate a response. Sections D and E provide an outline of questions that should be directed toward vendors about their capabilities, products and services. This entire document can be edited to meet your organization's specific requirements and informational needs.

E-Learning Request for Proposal

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A. Introduction

Company Background

Include a short company overview. Include information such as a brief history, industry background, company size, number of employees, web address, etc.

Project Purpose

Outline for vendors the business reasons for pursuing an e-learning solution. What problems or challenges do you face? What opportunities do you want to capitalize on? How do you foresee e-learning helping you achieve these initiatives?

For Example: *Current sales training efforts are too costly because sales representatives are spread across the country. An e-learning version of the sales training program will result in more timely training that is less expensive to deliver than current training approaches.*

Briefly outline the solution you are seeking. For example:

- Single vendor for LMS, courseware and development.
- A web-based, thin-client, hosted solution.
- Scalable platform capable of supporting _____ users.
- 24x7 access.
- Support for synchronous and asynchronous training.
- Integration/connectivity with _____ (existing legacy system(s)).
- Customized and off-the-shelf courseware in the following areas: _____.

Outline any important issues or considerations that will be critical to the e-learning solution. This may include information about your organization's approach to learning, technical knowledge of employees, existing training framework, etc.

Project Scope

Provide a short synopsis of how the e-learning solution will be implemented. For example, you may break the full implementation down into phases:

Phase #1: Pilot Program with ____ employees from ____ divisions.

Phase #2: Beta Test with North American facilities.

Phase #3: Launch with worldwide operations.

You may also include information about the future growth of your e-learning initiative, long-term goals and strategies, etc.

For example: *The primary objective is to convert the current product sales training program into a self-paced, web-based training modules that will be tracked via a learning management system.*

Audience

Provide information about the end-users of the e-learning solutions. For example:

Position/Functional Area	Location(s)	Number EEs	Training Needs
Sales	Worldwide	500	sales, presentations, business skills
Marketing	NY HQ	50	business skills, computer desktop skills
IT	NY HQ	200	MOUS certification, networking
Engineering	NY HQ	100	CAD, instrumentation (custom)
Warehouse	OR, MO, IA, PA, FL	500	OSHA compliance, workplace safety
Technicians	Worldwide	100	networking, computer hardware repair
Customer Service	NY HQ	200	customer service, telephone etiquette

Another Example: *The audience for this program is _____. The size of this group is _____ and they are located _____. The audience all speak/do not all speak English and there is no need for other language versions. The audience is/is not computer literate.*

Target Hardware, Software & Platform

Provide as much detailed information as possible about the hardware, software and Internet connectivity that each distinct employee group has access to including: processor type, RAM/ROM, CD/DVD, networking, sound card, operating system, applications, browser, Internet connectivity, screen resolution, plug-ins.

You should also provide information about your IT infrastructure, including hardware and software, firewall specifications, etc.

B. Vendor Instructions

Schedule for Evaluation Process

Provide an expected timeline for your evaluation and decision-making process. For example:

RFP distributed to vendors	January 15
Deadline for RFP responses	February 10
Invitations for formal presentations	February 17
Vendor demonstrations/presentations	March 1-2
Selection of vendor/contract negotiation	March 10

Number of Copies & Contact Information

Please submit ___ original copies and an electronic copy (on disk or via e-mail) of your proposal, including all supporting documentation, to:

Name
Company
Address
City, State ZIP
Phone
E-mail

Please contact _____ at _____ or via e-mail at _____ with any questions about the RFP.

Proposal Format

Outline any specifics regarding how you want vendors to format their responses to your RFP.

Confidentiality

Include a confidentiality statement if deemed necessary.

Notifications

Describe how and when vendors will be notified regarding requests for additional information, formal presentations and the outcome of the selection process.

C. Basis of Award

Outline the criteria you will use to evaluate each RFP response. Provide as much detail as you can. This will help vendors understand what is important to you, and address your needs accordingly. Areas to consider include:

- Technical capability
- Software capability
- Functionality
- Vendor support, responsiveness and follow-up
- Ease of use
- Flexibility and ease of product implementation
- Implementation plan and support
- Pricing
- Timely and complete response to RFP
- Vendor client references
- Results of requested demonstrations and presentations

D. Vendor Questionnaire

Company Overview

- Provide contact information for the principle individual(s) to be contacted regarding the information in this RFP.
- Provide a brief history of your company and the location of corporate headquarters and offices.
- How long have you been in business? How long have you been providing e-learning services?
- Are you a private or publicly traded company? If public, provide your ticker symbol and a copy of your company's latest Annual Report. If private, how did the business start, and who funded the start-up? Provide evidence of your company's financial stability and projected longevity.
- Indicate the total number of employees, by location (if appropriate) and function (product development, instructional design, sales & marketing, customer service, technical support, etc.).
- Describe your core product and service lines.
- How many current e-Learning clients do you have?
- Describe what differentiates your organization from your competitors.
- List any awards or industry recognition your company has received, especially as related to the ASP delivery of e-learning.

E-Learning/Learning Management System Solution

Overview

- Provide an overview of your learning management system solution. Attach any relevant marketing materials and data sheets.
- Describe the user interface and system navigation features. How is your interface and navigation superior to those of your competitors?
- In what ways can your system be customized?
- Describe online research tools that are built into your system.
- Describe help desk features built into your system.

Classroom Training Management

- Describe your systems classroom training management capabilities. Attach any relevant marketing materials and data sheets.

Physical Materials Management

- Describe your system's abilities to manage a physical inventory of training materials, including CD-ROMs, videos, books, electronic documents, etc. Attach any relevant marketing materials and data sheets.

Testing & Assessment

- Provide an overview of your system's testing and assessment capabilities.
- Describe the types of questions that are available to developers.

Reporting

- Describe the types of reports that are standard within your system. Attach any relevant marketing materials and data sheets.
- How can the user manipulate standard reports?
- Describe the student transcript and certificate features included with your system.
- Describe the process for developing custom reports upon our request.

Competency Management

- Describe the competency management features and capabilities of your e-learning solution. Attach any relevant marketing materials and data sheets.
- Describe how your competency management solution acts as a “guide to performance planning” for both employees and managers.
- How does your competency management tool account for and support a “blended learning environment?”
- Describe the process for creating pre-defined “learning paths” or “learning plans” within your competency management tool. Can these plans be modified once created? How are they assigned to individuals, groups of employees or globally to all employees?
- How does the tool handle deadlines and task reminders?
- Describe the reporting features included with your competency management tool.

Communication & Collaboration Capabilities

- Provide an overview of the communication and collaboration capabilities your system includes.
 - ✓ Electronic Bulletin Boards (moderated or unmoderated?)
 - ✓ Course-specific Bulletin Boards (for enrolled students)
 - ✓ Internal E-Mail Messaging
 - ✓ Text Chat
 - ✓ Electronic Calendars

E-commerce

- Describe your system's e-commerce and payment system capabilities.

Learning Content Management System (LCMS)

- Provide an overview of your learning content management system (LCMS) solution. Attach any relevant marketing materials and data sheets.
- Describe the level of interoperability and/or integration between your LMS and LCMS solutions.
- Describe the course development capabilities of your LCMS. How does your LCMS ensure sound instructional design?
- Describe online search/research tools that are built into the system.
- Describe help features built into your system.

Implementation Time & Process

- What is the average implementation time for a system similar to the solution being requested.
- Describe the implementation, project management and quality assurance process.
- What planning and project management tools do you employ?
- What is your standard project review cycle?
- How do you provide clients with up-to-date information on a project's progress?
- Provide an overview of the people involved in an implementation.
- How do you manage and control costs?
- How do you manage and control risk?

System Requirements

- List server type(s) supported.
- List database(s) supported.
- Minimum system requirements (end user and administrator)
- Recommended system requirements (end user and administrator)
- Additional software required to use the system (end user and administrator)

Scalability & Reliability

- Summarize how you address scaling up the system for enterprise-wide use.
- Summarize the actions taken to ensure the reliability and robustness of your system.
- What makes your system superior to other platforms in terms of technology platform?

Customer Service & Technical Support

- Describe your technical and customer support services.
- How do you track technical support requests, problems, fixes, etc?
- How do you ensure communication and feedback from users?
- Describe the system training provided to administrative staff upon system launch.
- Describe any promotional services and programs you can provide to ensure the successful launch of our e-learning system.
- Do you provide customers with a Service Level Agreement? If yes, please describe or attach an example.

ASP Hosting & Security Specifications

- Provide an overview your ASP hosting services.
- How is your hosting environment kept physically secure?
- Provide any data sheets or specification documents related to your hosting environment. Note equipment, systems and back-up procedures that will ensure the security and integrity of our data.

Off-the-Shelf Courseware

- What is your organization's core competency with regard to off-the-shelf e-learning courseware?
- Who are your major 3rd-party integration partners? Describe to what extent are these partners' courseware integrated with your LMS offering?
- Who is responsible for revising and updating course content? Describe the process that is followed.
- List the topic areas that your courseware offering addresses. Is this available online in a searchable format prior to purchase?
- Describe standards to which your courseware conforms (i.e. SCORM, AICC, other).
- What information technology certifications do your online courses support (i.e. MCSE, MOUS, CCNA, CNE, A+, etc.)?
- How can we evaluate your courseware prior to purchase?
- What languages are your courses offered in other than English?
- Describe any accredited degree programs (bachelor's, MBA, MPA, etc.) that can be accessed using your system.
- Do we have to contract with another vendor, or can courseware be contracted for directly through you as a single-source vendor?
- Describe how you can provide a "total training solution."

Custom Courseware Development Capabilities

Be sure to provide vendors with details about where content will come from (i.e. does it exist in another format such as print, CD-ROM or video?). For Example: *The current sales training is in classroom format and consists of instructor's notes and PowerPoint slides. The content will need to be updated to reflect the features of the new product version, along with updated pricing policies and methods for dealing with client objections. The original training needs analysis is generally still applicable other than the need to provide updated information.*

You'll also want to list the features that you would like to be included in the program. For example: *These self-paced courses will include the following features:*

- *Self Paced (include expected course length in student seat time)*
 - *Pre-Test*
 - *Post-Test*
 - *Course Evaluation*
 - *Mentor*
 - *Discussion Board*
 - *Chat Room*
 - *Animations*
 - *Interactive Exercises*
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- Describe your organization's custom content development services and capabilities.
 - Outline your instructional design philosophy.
 - What courseware development tools do you use? Are these tools included with your LMS package? If not, to what extent can they be integrated?
 - Describe the functional roles various people play on a custom development project.
 - Provide an overview of your instructional design process, quality assurance program and adherence to standards (i.e. AICC and SCORM).

Synchronous Training (Webcasting)

- Provide an overview of your system's interoperability with live (synchronous) webcasting tools.
- Describe the core features and capabilities of the synchronous tool you would recommend. Attach any relevant marketing materials and data sheets.
- Provide minimum and recommended system requirements for the synchronous tool you are recommending.

Contracting & Pricing

- Provide a breakdown of the pricing for your proposed solution for 1-, 2- and 3-year terms.
- Which items are optional and/or can be added at a later date?
- What costs can the customer control?
- Are there any suggestions you can make to reduce the overall cost?
- Identify any multi-year, volume or other discounts available?
- Outline proposed payment terms, identifying any up-front “set-up” payments, one-time costs, annual leases, etc.
- Please summarize any pricing and options available for training services, implementation, extended technical support, etc.
- How do you bill for your services (monthly, quarterly, annually, etc.)?
- How are bills itemized? What level of cost detail do you provide?
- Are there standard contract durations for your services? What are the associated terms and conditions? Please attach a sample contract and/or lease agreement.
- Are there any back-end costs after completing the contract? Describe.

Customer References

- Please provide 3 to 5 references of current users that we may contact as references. Include the company names, addresses, phone numbers and contact persons.

Additional Information

- Please attach any additional information that you feel will provide helpful information about your company’s products and services.

E. Availability of Features & Functionality

Feature/Function	Existing Capability (Y/N)	Planned Availability (provide date)	Comments
Interface			
Ability to modify/customize the user interface			
Automatic custom home page for each user/student			
Learner interface available in multiple languages (list)			
Can provide different look and feel and business rules for multiple departments			
Section 508 compliance (ADA)			
Content			
Launches and tracks Web-based learning			
Interoperability with 3 rd -party content, including courseware, webcasting, authoring tools, etc. (list vendors)			
Ability to run web-based courses developed by internal staff using _____ (name tools).			
Links to other training sites or resources			
Interoperability with content that is not standards-compliant (i.e. PowerPoint)			
Can disable a course without removing it from the LMS			
AICC-compliant			
SCORM-compliant			
Ability to offer accredited degree programs (BA, MBA, MPA, etc).			
Hosting & Support			
ASP hosting option			
24x7 user/technical support			
Tech support via phone			
Tech support via e-mail			
Tech support via fax			
Tech support for multiple time zones			
E-Commerce			
Integrated e-commerce capability for payment of courses, classes or live webcasting			
Support for other currencies (besides US\$)			
Can support credit card transactions without manual effort			
VeriSign security			
Payment system for tracking internal costs and charge-backs			
Payment reporting features			

Communication & Collaboration			
Electronic discussion boards (moderated or unmoderated?)			
Course-specific bulletin boards for enrolled students only			
Live webcasting and virtual meeting capabilities			
Web-based calendar and scheduling devices			
Live text chat capability			
Internal e-mail messaging			
Global broadcast messaging			
Administrative Functions			
Web-based access to administrative features, data and reporting			
Ability to track both web-based and live instructor-led training			
Enroll and cancel registration for ILT			
Student self-registration option			
Registration with manager approval			
Registration confirmation via e-mail			
Searchable course catalog			
Built-in content authoring tool			
Built-in testing and survey creation engine			
Ability to set passing scores for tests			
Tests can be auto-graded by system			
Ability to set prerequisites for courses and classes			
Courses can be grouped into curriculum and topic areas			
Ability to reserve rooms, equipment and other resources for ILT			
Activate/deactivate users from system			
Create custom tests, surveys and opinion polls			
Create learning plans			
Create employee reports from a Web browser			
Create class reports from a Web browser			
Assign classes and deadlines for employees			
Send reminder notices via e-mail			
Batch registration option			
Individual (manual) registration option			
Search for courses and materials by title, keyword, etc.			
Assign students to groups or departments			
Collect student feedback and surveys			
Student transcripts (viewable and printable)			
Student certificates (for completion)			
Web-based student notes			
Create, change and view student and instructor biographies			
Customizable naming conventions and rating systems			

System is modular, allowing deployment of only required functionality			
Security (passwords and user IDs determine authentication)			
Automated system to help users who have forgotten their password			
Live Classroom Management			
Schedule, register for, and track live classroom training (ILT)			
Waiting list function			
Facility management			
Equipment and resource management			
Automatic resolution of scheduling conflicts			
Manage physical inventory of training materials (product library of CD-ROMs, videos, books, etc.)			
LMS Reporting			
Web-based reporting interface			
Standard reports included (describe)			
Ability to export report data (i.e. to Excel)			
Reports can be printed			
Access to reports determined by user's access level			
Integration with legacy HR/HRIS systems			
Ability to import user data from other systems/sources			
Server-level user authentication			
Online library of physical training materials			
Online library of electronic documents (Word, Excel, PPT, PDF, etc.)			
Competency Management			
Tool integrated with LMS; tracks progress			
ASP delivery model			
Ability to develop learning paths or plans			
Ability to modify learning paths or plans			
Ability to track progress along a path or plan (i.e. via the LMS)			
Can manage a blended learning environment (i.e. tracks online, CBT/WBT, classroom/ILT, physical materials, events, etc.)			
Ability to assign multiple paths or plans to a user			
Can assign paths to selected group of users simultaneously; also globally			
Ability to set deadlines for individual task assignments			
Ability to set deadlines for completion of entire learning path or plan			
Ability to send e-mail reminders for approaching deadlines and overdue tasks			
Tracks certification deadlines and regulatory compliance			
Includes built-in search function			

Learning Content Management System			
Integrated with LMS			
ASP delivery model			
Support reusable learning objects			
Learning objects are searchable			
Learning content can be created using HTML			
Learning content can be created using Adobe PDF files			
Learning content can be created using Macromedia Flash files			
Learning content can be created using Java			
Learning content can include high quality visuals and interactivity			
Ability to create pre- and post-testing for each course module			
Learner can review answers and results			
Each question is linked to corresponding content screens so learner can easily review needed material			
Interactive review questions can be placed throughout the body of the course			
Course reporting provides learners with the ability to monitor and evaluate their own progress			
Can set passing grades for test			
Course can be modified/updated			