

REQUEST FOR PROPOSALS (RFP) NO. 19-0237  
TO PROVIDE  
LEARNING MANAGEMENT SOFTWARE SERVICES  
FOR  
THE OFFICE OF THE VICE PRESIDENT OF ADMINISTRATION  
UNIVERSITY OF HAWAII  
HONOLULU, HAWAII

DECEMBER, 2018

BOARD OF REGENTS  
UNIVERSITY OF HAWAII  
HONOLULU, HAWAII

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## NOTICE TO OFFERORS

PROPOSAL FORMS for Request for Proposal (RFP) No. 19-0237, Learning Management Software Services, will be available from and received at the OFFICE OF PROCUREMENT AND REAL PROPERTY MANAGEMENT, UNIVERSITY OF HAWAII, 1400 LOWER CAMPUS ROAD, ROOM 15, HONOLULU, HAWAII 96822, no later than **2:30 p.m., January 22, 2019**. Proposals received after the time and date fixed for submission will not be considered.

Vendors located outside the Island of Oahu, Hawaii, USA, may request an official copy of the RFP to be sent via U.S. Postal Service by providing the vendor's name, address, contact person and telephone number. If express shipment is desired, requests must be submitted in writing with an account number, BILLABLE TO THE RECEIVER, and an authorized signature. Requests may be transmitted via facsimile, (808) 956-2093. Direct all questions to Shawn Richey, (808) 956-7977.

David Lassner

President, University of Hawaii

Posting Date: December 6, 2018

**Vendors downloading the RFP shall be responsible for notifying the Procurement Specialist, Shawn Richey (Email: [richeys@hawaii.edu](mailto:richeys@hawaii.edu); Fax: [808] 956-2093) so that the name, address, phone number, fax number, and email address of the vendor can be listed on the University's register for the purpose of notification of amendments to the RFP which are issued.**

NOTICE TO OFFERORS

## **BUSINESS CLASSIFICATION CERTIFICATION STATEMENT**

**Vendors:** Please complete the following information below. If you answer "No" to question No. 1, complete the certification portion and submit together with your bid document or quote.

(Terms used are taken from the Small Business Administration Rules and Regulations and the Federal Acquisition Regulation [FAR].) (Reference Section A on the reverse side of this form for Category Descriptions.)

This is to certify that the company identified below:

1. ☐ IS a **small business** as defined in the Small Business Administration regulations.  
(see reverse for size standards).  
☐ IS NOT a small business as defined in the regulations.  
(If you checked here, STOP, GO TO CERTIFICATION BELOW.)
2. ☐ IS a **small disadvantaged business concern** and is identified, on the date of its representation, as a certified small disadvantaged business in the database maintained by the Small Business Administration (PRO-NET).
3. ☐ IS a **women-owned small business concern** of which at least 51% is owned, controlled, and managed by one or more women; or in the case of any publicly owned business, at least 51 percent of the stock of which is owned by one or more women.
4. ☐ IS a **HUBZone small business concern** that appears on the List of Qualified HUBZone Small Business Concerns maintained by the Small Business Administration.
5. ☐ IS a **veteran-owned small business concern** of which not less than 51 percent is owned, controlled and managed by one or more veterans; or in the case of any publicly owned business, at least 51 percent of the stock of which is owned by one or more veterans.
6. ☐ IS a **service-disabled veteran-owned small business concern** of which not less than 51 percent is owned, controlled and managed by one or more service-disabled veterans, or in the case of any publicly owned business, not less than 51 percent of the stock of which is owned by one or more service-disabled veterans as defined in 38 U.S.C. 101 (16).

### **CERTIFICATION:**

I hereby certify the information supplied herein to be true and correct.

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

\_\_\_\_\_  
Signature of Company Officer

Type of Goods/Services: \_\_\_\_\_

\*NAICS Code: \_\_\_\_\_

Company Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Print Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

Any misrepresentation shall be subject to the provisions stated in item B on the reverse side.

\*North American Industry Classification System (NAICS)

- A. "SMALL BUSINESS" SIZE STANDARDS FOR FEDERAL SUB-CONTRACTORS. Small business size is determined by the primary NAICS Code. See Title 13 CFR, Part 121 to determine your NAICS Code and the threshold for determining small business (revised as of January 1, 2004).

A "small business" is a concern including its affiliates, which is independently owned and operated. It is not dominant in the field of operations in which it is selling goods and services to a federal contractor. It meets the following size criteria for its particular industry:

1. CONSTRUCTION TRADES - "Small" if average annual receipts for preceding 3 years do not exceed \$12 million.
2. CONSTRUCTION, GENERAL CONTRACTORS - "Small" if average annual receipts for preceding 3 years do not exceed \$28.5 million.
3. MANUFACTURING - "Small" if 500 employees or less, except for some specific products which will increase the complement of employees to 750 and 1,000, respectively.
4. TRANSPORTATION - "Small" if average annual receipts for preceding 3 years do not exceed the amount shown for specific services:  
  
\$21.5 million – general freight trucking, local.  
\$3 million – travel agencies.
5. WHOLESALE TRADE, DURABLE AND NON-DURABLE GOODS - "Small" if 100 employees or less.
6. RETAIL TRADE - "Small" if average annual receipts for preceding 3 years do not exceed the amount shown for specific products:  
  
\$6 million - lumber and building materials, paints, hardware.
7. SERVICES - "Small" if average annual receipts for preceding 3 years do not exceed the amount shown for specific services:
  - a. \$21 million – computer systems design services, custom computer programming services.
  - b. \$10.5 million - refuse collection, protective guard services.
  - c. \$14 million - janitorial services.
  - d. \$21.5 million - passenger car rental.
  - e. \$21 million – office Machinery and equipment rental & leasing.
  - f. \$6 million - general automobile repair, refrigeration & air conditioning.
8. ALL OTHER TYPES OF BUSINESS - "Small" if 500 employees or less.

Where firm sizes are determined by annual receipts, and the concern is less than 3 complete fiscal years old, its total receipts means for the period it has been in business, divided by the number of weeks, including fractions of a week, and multiplied by 52.

- B. Notice. Under 15 U.S.C. 645(d), any person who misrepresents a firm's status as a small, small disadvantaged or women-owned small business concern in order to obtain a contract to be awarded under the preference programs established pursuant to sections 8(a), 8(d), 9, or 15 of the Small Business Act or any other provision of Federal law that specifically references section 8(d) for a definition of program eligibility, shall:

1. Be punished by imposition of fine, imprisonment, or both;
2. Be subject to administrative remedies including suspension and debarment; and
3. Be ineligible for participation in a program conducted under the authority of the Act.

## **SECTION 1 ADMINISTRATIVE OVERVIEW**

### **1.1 INTRODUCTION**

This is a Request for Proposals (RFP) issued by the University of Hawaii to solicit proposals from Offerors who wish to be considered for providing Learning Management Software (LMS) services for the Office of the Vice President of Administration (OVPA) for the University of Hawaii. The LMS will be used to track and certify the completion of employee training requirements for OVPA's various system administration offices (Refer to Section 2.1 Overview of Scope of Work). This solution is intended to provide a corporate training environment and will not encompass or replace any aspect of the University's academic instruction environment for credit or non-credit learning management.

### **1.2 AUTHORITY**

This Request for Proposals (RFP) is issued under the provisions of the Hawaii Revised Statutes, Chapter 103 and 103D. All prospective Contractors are charged with presumptive knowledge of all requirements of the cited authorities. Submission of a valid executed proposal by any prospective Contractor shall constitute admission of such knowledge on the part of such prospective Contractor.

### **1.3 RFP ORGANIZATION**

This RFP is organized into the following sections:

Section 1, Administrative Overview -- Provides Offerors with general information on the objectives of this RFP, procurement schedule, and procurement overview.

Section 2, Scope of Work -- Provides Offerors with a general description of the tasks to be performed, delineates University and Contractor responsibilities, and defines deliverables.

Section 3, Proposal Requirements -- Describes the required format and content for the Offeror's proposal.

Section 4, Criteria to Evaluate Proposals -- Describes how proposals will be evaluated by the University of Hawaii.

Section 5, Special Provisions -- Provides Offerors the terms and conditions under which the work will be performed.

#### 1.4 SCHEDULE OF KEY DATES

The schedule of key dates set forth herein represents the University's best estimate of the schedule that will be followed. Any of the dates listed below may be changed at any time at the sole discretion of the Director, Office of Procurement and Real Property Management.

RFP Posting Date	<u>December 6, 2018</u>
Closing Date for Submission of Questions	<u>December 17, 2018</u>
University Response to Offerors' Questions	<u>December 28, 2018</u>
Closing Date for Receipt of Proposals	<u>January 22, 2019</u>
Initial Evaluation Period	<u>January 23-31, 2019</u>
Offeror Presentations (If Necessary)	<u>February 4-15, 2019</u>
Final Evaluation Period (If Necessary)	<u>February 18-28, 2019</u>
Contractor Selection and Award	<u>March 14, 2019</u>
Contract Effective Date	<u>April 10, 2019 (tentative)</u>

#### 1.5 SUBMISSION OF QUESTIONS

Offerors may submit questions in writing to the issuing officer. The deadline for submission of written questions is **4:30 p.m. HST, on December 17, 2018.**

Offerors may call the Technical Representative, Donna Bulosan, at (808) 956-3953 for questions regarding the content of the work specifications.

#### 1.6 SUBMISSION OF PROPOSALS

Offerors shall submit an original plus FIVE (5) hard copies and ONE (1) electronic copy (on USB Flash Drive) of the proposal. The electronic copy shall contain the same information as printed on the hard copies. Proposals shall be received by the Office of Procurement and Real Property Management, University of Hawaii, no later than **2:30 p.m. HST, on January 22, 2019.** Any proposal received after this date and time shall be rejected.

Proposals shall be mailed or delivered in sealed envelope or package to the following address:

Office of Procurement and Real Property Management  
University of Hawaii  
1400 Lower Campus Road, Room 15  
Honolulu, Hawaii 96822

The outside cover of the package containing the proposal shall be marked as follows:

Office of Procurement and Real Property Management  
University of Hawaii  
1400 Lower Campus Road, Room 15  
Honolulu, Hawaii 96822  
RFP No. 19-0237, Learning Management Software Services  
(Name of Offeror)

#### 1.7 COSTS FOR PROPOSAL PREPARATION

Any costs incurred by Offerors in preparing or submitting a proposal shall be the Offeror's sole responsibility.

#### 1.8 DISQUALIFICATION OF PROPOSALS

- A. The University reserves the right to consider as acceptable only those proposals submitted in accordance with all requirements set forth in this RFP and which demonstrate an understanding of the scope of the work. Any proposal offering any other set of terms and conditions contradictory to those included in this RFP may be disqualified without further notice.
- B. An Offeror may be disqualified and the proposal automatically rejected for any one or more of the following reasons:
  - 1) The proposal shows any non-compliance with applicable law.
  - 2) The proposal is conditional, incomplete, or irregular in such a way as to make the proposal indefinite or ambiguous as to its meaning.
  - 3) The proposal has any provision reserving the right to accept or reject award, or to enter into a contract pursuant to an award, or provisions contrary to those required in the solicitation.
  - 4) The Offeror is debarred or suspended.



## 1.9 PROCUREMENT OFFICER

This RFP is issued by the Office of Procurement and Real Property Management, University of Hawaii. The Procurement Officer responsible for overseeing the contract is Mr. Duff Zwald, Director of the Office of Procurement and Real Property Management.

## 1.10 TECHNICAL REPRESENTATIVE OF THE PROCUREMENT OFFICER (TRPO)

The individual below is the Technical Representative of the Procurement Officer:

Donna Bulosan  
UH IT Manager, Office of Systems Integration  
Telephone: (808) 956-3953  
Facsimile: (808) 956-3952  
Email: [dbulosan@hawaii.edu](mailto:dbulosan@hawaii.edu)

Administrative Services Building 2  
University of Hawaii  
2440 Campus Road  
Honolulu, Hawaii 96822

## 1.11 ISSUING OFFICER

The individual listed below is the issuing officer and the official contact for all communication regarding this RFP:

Shawn Richey, Procurement Specialist  
Office of Procurement and Real Property Management  
University of Hawaii  
1400 Lower Campus Road, Room 15  
Honolulu, Hawaii 96822  
Telephone: (808) 956-7977  
Facsimile: (808) 956-2093

## 1.12 CHANGES TO CONTRACTOR'S FEE

It is recognized that audit disallowances and other changes may require adjustments in the compensation due to the Contractor. In the event that future actions would either disallow or minimize the payments already made to the Contractor, the Contractor shall assist the University in defending the correctness of the claim for reimbursement. If the disallowance or adjustment is upheld, then the Contractor will participate in the payback to the extent the amount of the disallowance or adjustment contributed to the total fee

received by the Contractor. Payment to the University shall be made within THIRTY (30) calendar days from which official notice is received by the Contractor from the University.

1.13 RFP AMENDMENTS

The University reserves the right to amend the RFP any time prior to the Closing Date for Receipt of Proposals.

1.14 AWARD ON INITIAL PROPOSALS

The University may award a contract on the basis of initial offers received, without discussions. Therefore, each initial offer should contain the Offeror's best terms.

1.15 AVAILABILITY OF FUNDS

Offerors are advised that the award of this contract is contingent upon availability of funds. If funds are not available, the University reserves the right not to make award of this contract.

1.16 NOTICE TO PROCEED

The University shall not be responsible for work done, even in good faith, prior to the University's Notice to Proceed unless specific provisions are made in the contract.

1.17 RFP SUBMITTALS BECOME PROPERTY OF THE UNIVERSITY

All proposals and other material submitted shall become the property of the University and may be returned only at the University's option.

## SECTION 2 SCOPE OF WORK

### 2.1 OVERVIEW OF THE SCOPE OF WORK

The University of Hawaii, Office of the Vice President of Administration (OVPA) requires a reliable, robust, scalable, and flexible, standards based Learning Management Software (LMS) that is capable of meeting the current and growing demands of management, staff and faculty that rely on services offered by the offices under its purview: The Office of Procurement and Real Property Management, Office of Human Resources, Office of Institutional Equity (Title IX), Office of Sustainability and Planning, Facilities Business Office, Office of Systems Integration and Office of Communications.

The LMS will assist in improving instructional practice and professional excellence by delivering and monitoring employee professional learning and increase operational efficiency and effectiveness by eliminating manual processes, redundant data collection and reliance on stand-alone systems/trainings. The LMS will be responsible for certifying and maintaining employee compliance with core University trainings, including training offered through in-class, webinar and online on-demand methods.

The University of Hawaii has approximately 10,000 employees. For the purposes of this RFP, it is expected there will be 3,000 active users and up to an additional 7,000 limited or guest users (1-3 courses per year). There is no legacy professional development LMS that requires migration services.

The LMS must include an intuitive and accessible interface that enables users to interact with the system easily while still providing users all the necessary functions and ability to integrate third-party programs when needed. The LMS must have the capability of exchanging data with other systems and must allow the OVPA to query data for informative reports.

The OVPA is only interested in proposer-hosted solutions. For the purpose of the RFP, "proposer-hosted" refers to any off premises alternative where the vendor installs and maintains the proposed software and manages, or contracts for, any needed hardware, including LMS implementations directly hosted by the proposer as well as cloud or software as service option.

### 2.2 STATEMENT OF WORK (TECHNICAL SPECIFICATIONS)

The University of Hawaii's goal is to award a contract to ONE (1) firm that can provide a reliable solution for all of the following:

## A. GENERAL SERVICES

1. Software as a Service, including hosting, patches, upgrades, hardware changes and related system management activities.
2. LMS that is designed, developed and deployed in accordance with industry standards and best practices.
3. Documentation of required file formats for data feeds to and from the Contractor's system. The University and the Contractor shall mutually agree on the format and the specific information to be included in each file.
4. Electronic copy, provided to the University, of its user and system administration manuals for all services provided in the contract.
5. Reasonable server uptime with defined service level agreements (SLA) to ensure 24/7 availability.
6. Data security assurance program that protect confidential data.
7. System architecture in place to allow for backups, testing, staging and recovery/redundancy so the production (live) instance is not impacted.
8. Automatic logoff, audit (transaction logging) and data integrity controls.
9. Archiving capabilities for courses, course content and training records.
10. Flexible customization options for the following:
  - Institutional branding.
  - Roles and user hierarchy.
  - User interface.
  - Permissions/settings limitations.
  - Reporting tools with data extract capabilities.

## B. INTEGRATION SERVICES

1. API library for integration purposes.
2. Integration with human resource systems such as PeopleSoft Human Resources Information system v.9.2. The University's database standard is a mix of Oracle RDBMS 11g and 12c.
3. User authentication against the University's single sign on account management system utilizing the Central Authentication Service (CAS) and Shibboleth authentication technologies as well as LDAP. The University will use system data as part of user account provisioning that is roles and permissions based and to manage the account lifecycle of users (create/reactivate, enable/disable and terminate accounts).

## C. CONTENT MANAGEMENT

1. Easy and intuitive creation of live or recorded webinar, in-class or on-demand course offerings, including the ability to attach all associated resources for each offering.
2. Robust environment for content authoring that:
  - a. Is easy to use and intuitive.
  - b. Allows for integrations with third-party content and learning tools.
  - c. Supports multiple content and media format types (e.g., SCORM, video, images, text, audio).
  - d. Allows for the import and export of content to and from other learning management systems.
3. Comprehensive course and content management providing:
  - a. Methods to assign access to content based on specific user parameters.
  - b. Master Course and Unit file templates for standardization of course offerings.
  - c. Intuitive access to third-party and instructor created content/course databases.
  - d. Bulk course copy and combine/merge course offerings.
  - e. Step-by-step set up guides for essential functions.
4. Learning assessment tools that:
  - a. Track/review learner progress.
  - b. Automate testing and scoring.
  - c. Create and store quiz offerings.
  - d. Survey and poll users for feedback.
  - e. Quiz authoring tools with quiz banks.
  - f. Allow for the import of third-party assessment resources.
  - g. Export assessments to alternative file formats.
5. Certification capabilities that:
  - a. Automate certification rules that align with the requirements of a business unit.
  - b. Customize completion requirements to obtain certification.
  - c. Track attendance and completion of requirements.
  - d. Customize recertification requirements including automatic decertification.
  - e. Automate notifications of requirement completion status, certification

status and recertification reminders.

- f. Customize certificates of completion that are easily exported to standard file formats.

#### D. USER EXPERIENCE, ACCESSIBILITY AND MANAGEMENT

1. Optimized for mobile use and compatible with all major mobile devices and operating systems (android, iOS, etc.).
2. Compatible with the latest versions of major browsers (Google Chrome, Microsoft Edge, Apple Safari, Mozilla Firefox, etc.).
3. Complies with Web Content Accessibility Guidelines and provides full usability for users/instructors with vision, hearing or other physical impairments.
4. Intuitive user interface that reflects contemporary design standards and allow for the clear and intuitive branding of training modules for each program.
5. Catalog based option for presenting all courses being offered and includes intuitive enrollment procedures including a confirmation record of enrollment.
6. Dashboard or progress tracking system that allows users to easily identify trainings they need to complete, have enrolled in or started, and have completed.
7. Announcement features to disseminate information to users.
8. Administrative capabilities to allow the assignment of different permission levels to specific work groups, departments, colleges and campuses.
9. Enrollment options including the ability to do bulk enrollments, wait listing, create, archive, deactivate and delete accounts.

#### E. SUPPORT SERVICES

1. Adequate and dedicated support for the contract administrator and other key stakeholders in the administration and troubleshooting of the LMS. During implementation, whether the vendor implementation team is on-site or working remotely, vendor should be available Monday-Friday, 8:00 am – 5:00 pm HST.
2. Online training videos, documentation and on-site trainings for users and administrators.
3. Technical support model and escalation process for post implementation technical issue resolutions (Service Level Agreement for performance metrics may be required).
4. Customer support model and escalation process for post implementation non-technical issue resolutions. At a minimum, a 24/7 phone number and online

chat shall be available. (Service Level Agreement for performance metrics may be required).

#### F. REPORTING

1. Robust reporting system including analytics, dashboard capabilities and data visualization features that allow for the intuitive consumption of relevant data based on the user role (user, instructor and administrator).
2. Custom reports to be generated and exported by the system.

#### G. LMS ROADMAP

Offeror's proposal shall include a detailed narrative describing future system improvements including additional services, partnerships, infrastructure changes, and interface changes. Offeror shall include an estimated timeline for deployment of these changes and what stage they are in now. Narrative shall clearly define the responsibilities of the University to assist in each deployment.

#### H. TRIAL ACCOUNTS

Offeror's proposal shall include credentials and accesses to sample user accounts; each sample account should be accompanied by a basic written instruction that highlights a feature the Offeror deems most appropriately highlights their understanding of the University's need. All trial accounts should be made available to the University at the proposal closing date and remain valid for no less than THIRTY (30) days.

At least ONE (1) trial account should be dedicated to the certification process for each user type. All other accounts will be designed at the discretion of the Offeror but should highlight a specific process.

A description for each account's use case and instructions shall be provided:

- At least FOUR (4) Instructor trial accounts.
- At least THREE (3) Student/user trial accounts.
- At least THREE (3) Administrator trial accounts.

### 2.3 MINIMUM QUALIFICATIONS

Offerors shall have a minimum of FIVE (5) years of experience in providing learning management software.

Offerors shall provide the names of THREE (3) large corporations or universities that are presently under contract for the learning management software services.

## 2.4 ADDITIONAL SERVICES

Services or products requested by the University that are not a part of this contract, shall be paid at rates which are reasonable and equal to the rates charged by the Contractor for providing such services to other customers with comparable number of assignments, size of receivables and fee rates.

To the extent that no comparable service is being provided by the Contractor, payment will be at Contractor's stated rates which shall be comparable to reasonable rates within the learning management system industry in light of the service requested.



## SECTION 3 PROPOSAL REQUIREMENTS

### 3.1 INTRODUCTION

This section indicates the proposal requirements for this RFP which shall be submitted by the deadline set for submission of proposals. Fulfillment of all proposal requirements listed is mandatory for consideration of proposals.

The Proposal shall include the following subsections:

- Proposal Letter (Appendix A)
- Pricing Schedule (Appendix B) with Offer Price Form
- Project Narrative (Appendix C)
- Offeror's General Services (Appendix D)
- Offeror's Integration Services (Appendix E)
- Offeror's Content Management (Appendix F)
- Offeror's User Experience, Accessibility and Management (Appendix G)
- Offeror's Support Services (Appendix H)
- Offeror's Reports (Appendix I)
- Offeror's LMS Roadmap (Appendix J)
- Offeror's Trial Accounts (Appendix K)
- References (Appendix L)

### 3.2 PROPOSAL LETTER (Appendix A)

The Proposal Letter shown in Appendix A shall be signed by an individual authorized to legally bind the Offeror, dated, and be affixed with the corporate seal (if corporate seal is available). If said individual is not the corporate president, evidence shall be submitted showing the individual's authority to bind the corporation. The fully-executed proposal letter shall be submitted along with the proposal.

### 3.3 PRICING SCHEDULE (Appendix B)

Offeror shall complete the Offer Price Form and questions set forth in Appendix B. The Offeror shall provide all prices for all years: Failure to do so may result in the proposals disqualification. All pricing will be totaled for evaluation purposes only.

The University reserves the right to award based on the pricing method that is determined by the evaluation committee to be in the best interest of the University; even if that pricing method is not included in the Offer Price Form. Offerors shall honor all prices provided in the Offer Price Form.

**Software As a Service Licensing Fee** - This is an Offeror hosted, all-inclusive model that allows for unlimited users and unlimited course creation. This item should include the annual maintenance fee and technical and customer support fees.

**Price Per User** - This model is charged at an inclusive per user basis that includes all fees associated with hosting and unlimited course creation. Specify whether licensing model is based on named users or concurrent users. User is defined as anyone with credentials to access the system, this model excludes guest accounts.

**Implementation and set-up fees** - This includes all branding customization, the creation of TEN (10) custom reports, the creation of TEN (10) program catalogs and master course templates, interface with the University's HRIS System (Peoplesoft 9.2) and integration with the University's single sign on system.

**Training- Online and On-Site** - This pricing should include trainings for system administration, content development and reporting.

**Annual Software Maintenance Fee** - This fee is associated per user or per course models and includes updates, upgrades and fixes to their licensed software, as well as technical support for administrators.

**Customer Service Support** - This fee is associated with technical or specialized customer support, above those offered as the company's basic support.

### 3.4 PROJECT NARRATIVE (Appendix C)

Offeror shall submit with its Proposal a narrative describing your understanding of the desired LMS solution, a description of the proposed plan to implement an LMS from scratch and the benefits that will accrue to the University Hawaii System as a direct or indirect result of its performance of this contract.

The Narrative shall include, at a minimum the following sections:

Section 1: Project Summary and Overall Approach.  
Section 2: Background Information.  
Section 3: Timeline and Milestones w/ Responsibilities.  
Section 4: Benefits to the University.

Background information should describe the firm and its capability of providing an LMS solution that meets the needs of the University based on its experience.

Proposals that identify specific benefits as being contractually enforceable commitments will be rated more favorably than Proposals that do not identify specific benefits as contractual commitments, all other factors being equal.

3.5 OFFEROR'S GENERAL SERVICES (Appendix D)

Answer questions included in the appendix and describe your ability to provide the general services desired by the University.

3.6 OFFEROR'S INTEGRATION SERVICES (Appendix E)

Answer questions included in the appendix and describe your ability to provide the integration services desired by the University.

3.7 OFFEROR'S CONTENT MANAGEMENT (Appendix F)

Answer questions included in the appendix and describe your ability to provide the content management options desired by the University.

3.8 OFFEROR'S USER EXPERIENCE, ACCESSIBILITY AND MANAGEMENT (Appendix G)

Answer questions included in the appendix and describe your ability to provide the user experience, accessibility and management options desired by the University.

3.9 OFFEROR'S SUPPORT SERVICES (Appendix H)

Answer questions included in the appendix and describe your ability to provide support services desired by the University.

### 3.10 OFFEROR'S REPORTS (Appendix I)

Answer questions included in the appendix and describe your ability to provide report options desired by the University.

### 3.11 OFFEROR'S LMS ROADMAP (Appendix J)

Narrative shall provide future system improvements including additional services, partnerships, and infrastructure or interface changes. Each item listed on the roadmap should include a description of the improvement and its impact or potential impact to the University.

### 3.12 OFFEROR'S TRIAL ACCOUNTS (Appendix K)

Offeror shall include the trial account information as required by the University. Each trial account shall be designed to perform a function that will best exemplify the ability of the LMS to meet a need of the University. Each account should come with written instructions and details about the functionality the user should explore. At least ONE (1) account for each user type should be dedicated to the LMS's certification functionality.

### 3.13 REFERENCES (Appendix L)

Offerors shall provide a minimum of FIVE (5) references who can attest to the reliability of the Offeror's service and personnel. Furnish the names of colleges or universities, addresses, phone numbers, and contact persons. The University reserves the right to contact the references for additional information.

### 3.14 SAMPLES OF WORK

Upon request by the University, Offerors shall provide samples of the work performed for other colleges and universities. Samples will not be returned.

### 3.15 OFFEROR'S PROPOSAL SUBMITTALS CHECK LIST

The following checklist is provided to assist the Offeror in submitting the appropriate documents with their proposals:

1. \_\_\_\_\_ Business Classification Certification Statement.
2. \_\_\_\_\_ Appendix A, Proposal Letter (if applicable, shall include a corporate seal and an Evidence of Authority if the individual signing the

proposal on behalf of the company is not the corporate president).

3. \_\_\_\_\_ Appendix B, Pricing Schedule.
4. \_\_\_\_\_ Offer Price Form.
5. \_\_\_\_\_ Appendix C, Project Narrative.
6. \_\_\_\_\_ Appendix D, Offeror's General Services.
7. \_\_\_\_\_ Appendix E, Offeror's Integration Services.
8. \_\_\_\_\_ Appendix F, Offeror's Content Management.
9. \_\_\_\_\_ Appendix G, Offeror's User Experience, Accessibility and Management.
10. \_\_\_\_\_ Appendix H, Offeror's Support Services.
11. \_\_\_\_\_ Appendix I, Offeror's Reports.
12. \_\_\_\_\_ Appendix J, Offeror's LMS Roadmap.
13. \_\_\_\_\_ Appendix K, Offeror's Trial Accounts.
14. \_\_\_\_\_ Appendix L, References.

## SECTION 4 CRITERIA TO EVALUATE PROPOSALS

The evaluation of proposals received in response to the RFP will be conducted comprehensively, fairly, and impartially. The Contract will be awarded to the Offeror whose proposal is determined in writing to be the most advantageous to the University taking into consideration the evaluation factors set forth in this RFP.

Proposals will be examined for quality of recommendations to determine the effectiveness of the proposal in meeting University requirements including, but not limited to, the proposal's responsiveness to all specifications, quality of the Offeror's products or services, ability to perform the services, and general responsibility as evidenced by past performance. Price and discounts, although a factor, will not be the sole determining factor in award of the contract.

### 4.1 REVIEW OF MINIMUM REQUIREMENTS

In order to be considered for evaluation, a submitted proposal must be complete and meet all required components covered in this section and section 2.4 minimum requirements.

The purpose of this phase is to determine whether an Offeror's proposal is sufficiently responsive to the RFP to permit a complete evaluation. Each proposal will be reviewed for responsiveness. Failure to meet the minimum requirements may be grounds for deeming the proposal non-responsive to the RFP and rejection of the proposal. Only those proposals meeting the minimum requirements will be considered for evaluation.

Proposals must contain complete information and meet the intent specified in the following Sections/Appendices:

1. Section 2.4, Minimum Qualifications of Offer. .
2. Appendix A, Proposal Letter.
3. Appendix B, Pricing Schedule.
4. Offer Price Form.
5. Appendix C, Project Narrative.
6. Appendix D, Offeror's General Services.
7. Appendix E, Offeror's Integration Services.
8. Appendix F, Offeror's Content Management.
9. Appendix G, Offeror's User Experience, Accessibility and Management.
10. Appendix H, Offeror's Support Services.
11. Appendix I, Offeror's Reports.
12. Appendix J, Offeror's LMS Roadmap.
13. Appendix K, Offeror's Trial Accounts.
14. Appendix L, Offeror's References.

## 4.2 EVALUATION PROCESS

A committee will conduct an Initial Evaluation of all proposals which meet the minimum requirements and will collectively score each proposal submitted.

The Initial Evaluation shall be conducted based on the criteria set forth below in Section 4.3, INITIAL EVALUATION. Each individual on the evaluation committee will provide scores for each qualifying Offeror. The combined score of all evaluation committee members shall represent the Offeror's Initial Evaluation score.

The University may elect to award a contract to the Offeror with the highest Initial Evaluation score. Therefore, an Offeror's proposal should contain the Offeror's best terms from a cost and performance standpoint.

If an award is not made to the Offeror with the highest Initial Evaluation score, Offerors with the THREE (3) highest Initial Evaluation scores shall proceed to the Final Evaluation where they will provide a demonstration of their solution and a presentation of their entire proposal. In addition, Offerors may be requested to provide clarification and answers to questions regarding their proposal. The Technical Representative shall contact the Offerors to schedule a date and time for the presentation. Offerors can choose either an in-person or web-based presentation.

The Final Evaluation shall be based on the criteria specified in Section 4.4, FINAL EVALUATION. The evaluation committee shall re-evaluate all evaluation categories during the Final Evaluation phase. Each individual on the evaluation committee will provide scores for the Offerors not to exceed the maximum amount of points allowed (100 points) for the Final Evaluation. The Final Evaluation scores of all evaluation committee members will be totaled for each Offeror.

Award of the contract, if awarded, shall be made to the Offeror receiving the highest total Final Evaluation score.

The University reserves the right to bypass the Initial Evaluation and move straight into the Final Evaluation in the event that THREE (3) or less proposals are received.

4.3 INITIAL EVALUATION

The committee will evaluate and score each proposal submitted based on the following criteria:

- |    |   |                          |
|----|---|--------------------------|
| 1. | Prices, as provided in the Offer Price Form are competitive with industry standards. The lowest cost proposal will automatically receive TWENTY (20) points in this category. Point allocations for cost on all other proposals will be determined via the following formula: | <b>20 points maximum</b> |
| 2. | Pursuant to Section 3.4, the Project Narrative will be evaluated based on its impact, thoroughness and the potential benefit(s) to the University.  | <b>10 points maximum</b> |
|    | Very impactful, thorough and beneficial   | 8-10 points              |
|    | Impactful, thorough and beneficial  | 5 - 7 points             |
|    | Somewhat impactful, thorough and beneficial   | 2 - 4 points             |
|    | Not impactful, thorough or beneficial   | 0 - 1 point              |

For Criteria 3 – 8 The University prefers an Offeror’s response to Section 2, Scope of Work or corresponding Appendix questions that illustrates a comprehensive understanding of the desired functionality and mastery of the subject matter, including an explanation of how the functionality or deliverable will be achieved. Proposals which include limited responses such as “concur” or “will comply” will receive a lower ranking than those proposals that demonstrate an understanding of the desired functionality and include plans to meet or exceed them.

To be eligible for full points, the Offeror shall meet all elements of the desired scope of work and address/acknowledge their understanding of each question, regardless of their ability to satisfy its intent.

- |    |   |                         |
|----|---|-------------------------|
| 3. | Pursuant to Section 3.5, General Services will be evaluated based on answers to the Appendix questions and proposed ability to meet desired functionalities or deliverables (services). | <b>5 points maximum</b> |
|    | Comprehensive understanding of desired services with clear statements on how they will be met and exceeded.   | 5 points                |
|    | Understanding of desired services with clear statements on how they will be met or exceeded.  | 3 - 4 points            |
|    | Somewhat understanding of desired services  | 1 - 2 points            |



	and vague statements on how they will be met. Little understanding of desired services with unclear statements on how they will be met.	0 points
4.	Pursuant to Section 3.6, Integration Services will be evaluated based on answers to the Appendix questions and the proposed ability to meet desired functionalities or deliverables (services).	<b>5 points maximum</b>
	Comprehensive understanding of desired services with clear statements on how they will be met and exceeded.	5 points
	Understanding of desired services with clear statements on how they will be met or exceeded.	3 - 4 points
	Somewhat understanding of desired services and vague statements on how they will be met.	1 - 2 points
	Little understanding of desired services with unclear statements on how they will be met.	0 points
5.	Pursuant to Section 3.7, Content Management will be evaluated based on answers to the Appendix questions and the proposed ability to meet desired functionalities or deliverables (options).	<b>10 points maximum</b>
	Comprehensive understanding of desired options with clear statements on how they will be met and exceeded.	8-10 points
	Understanding of desired options with clear statements on how they will be met or exceeded.	5-7 points
	Somewhat understanding of desired options and vague statements on how they will be met.	2-4 points
	Little understanding of desired options with unclear statements on how they will be met.	0-1 point
6.	Pursuant to Section 3.8 Experience, Accessibility and Management, will be evaluated based on answers to the Appendix questions and the proposed ability to meet desired functionalities or deliverables (options).	<b>10 points maximum</b>

	Comprehensive understanding of desired options with clear statements on how they will be met and exceeded.	8-10 points
	Understanding of desired options with clear statements on how they will be met or exceeded.	5-7 points
	Somewhat understanding of desired options and vague statements on how they will be met.	2-4 points
	Little understanding of desired options with unclear statements on how they will be met.	0-1 point
7.	Pursuant to section 3.9, Support Services will be evaluated based on answers to the Appendix questions and the proposed ability to meet desired functionalities or deliverables (services).	<b>5 points maximum</b>
	Comprehensive understanding of desired services with clear statements on how they will be met and exceeded.	5 points
	Understanding of desired services with clear statements on how they will be met or exceeded.	3-4 points
	Somewhat understanding of desired options and vague statements on how they will be met.	1-2 points
	Little understanding of desired options with unclear statements on how they will be met.	0 points
8.	Pursuant to section 3.10, Reports will be evaluated based on answers to the Appendix questions and the proposed ability to meet desired functionalities or deliverables (services).	<b>5 points maximum</b>
	Comprehensive understanding of desired services with clear statements on how they will be met and exceeded.	5 points
	Understanding of desired services with clear statements on how they will be met or exceeded.	3-4 points
	Somewhat understanding of desired options and vague statements on how they will be met.	1-2 points
	Little understanding of desired options with unclear statements on how they will be met.	0 points

- |     |  |                          |
|-----|--|--------------------------|
| 9.  | Pursuant to section 3.11, LMS Roadmap will be evaluated based on the impact, thoroughness and applicability of services identified to be released through future improvements.   | <b>5 points maximum</b>  |
|     | Impactful, thorough and applicable   | 4 - 5 points             |
|     | Somewhat impactful, thorough and applicable  | 2 - 3 points             |
|     | Not impactful, thorough or applicable  | 0 - 1 point              |
| 10. | Pursuant to section 3.12, Trial Accounts will be evaluated based on the impact of the functions they highlight and the ease of use in completing each function. Offerors will not be eligible for full points if they do not provide the requisite amount of accounts and if at least one account for each user type does not highlight certification functionality. | <b>25 points maximum</b> |
|     | All Trial Accounts were provided and demonstrated exceptional ease of use and were very impactful.   | 21 - 25 points           |
|     | All Trial Accounts were provided and demonstrated ease of use and were impactful.  | 16-20 points             |
|     | All Trial Accounts were provided and demonstrated some ease of use and were somewhat impactful.  | 11-15 points             |
|     | Some of the Trial Accounts were provided and demonstrated ease of use and were impactful   | 6-10 points              |
|     | Some of the Trial Accounts were provided and demonstrated some ease of use and were somewhat impactful.  | 2-5 points               |
|     | Some or all of the Trial Accounts were provided and demonstrated no ease of use and lacked impact.   | 0-1 point                |

**TOTAL POSSIBLE POINTS      =      100 POINTS MAXIMUM**

#### 4.4 FINAL EVALUATION

The Final Evaluation shall be based on the Initial Evaluation and the Offeror's presentation. The Offeror shall provide a demonstration of its LMS and a presentation of their entire proposal. In addition, Offerors may be requested to provide clarification and answers to

questions regarding their proposal. The Final Evaluation Maximum Total Points is ONE HUNDRED (100) points and is based on the following items:

1. Oral Presentation of Proposal: **40 points maximum**

Presentation shall provide a comprehensive overview of how the Offeror's LMS will meet the needs of the University as described in the scope of work. The presentation shall address all Appendix required in the initial evaluation.

Evaluation shall be based on how clearly and concisely the presentation addresses all desired elements in the RFP.

2. Demonstration of LMS: **60 points maximum**

Demonstration shall be limited to NINETY (90) minutes and best illustrate how the Offeror's LMS will exceed the desired elements in the RFP.

Offeror's shall demonstrate the look and feel the University can expect in a final product and walk through the steps to create a certification program. The demonstration shall include a portion dedicated to the oversight and reporting afforded to administrators.

Evaluation shall be based on how the demonstration incorporates the Offeror's understanding of the University's vision as derived from the RFP and how the LMS meets and exceeds all desired elements.

**TOTAL POSSIBLE POINTS                      =                      100 POINTS MAXIMUM**

#### 4.5 AWARD

Award of contract, if awarded, shall be made to the Offeror receiving the highest weighted score.

## SECTION 5 SPECIAL PROVISIONS

### 5.1 SCOPE

The Request for Proposals to Provide Learning Management Software Services for the Office of the Vice President of Administration, University of Hawaii, Honolulu, Hawaii, shall be in accordance with the terms and conditions of RFP No. 19-0237 and the General Provisions dated September, 2013, included by reference. Copies of the General Provisions are available at the Office of Procurement and Real Property Management, University of Hawaii, 1400 Lower Campus Road, Room 15, Honolulu, Hawaii, 96822 or the General Provisions may be viewed at: <http://www.hawaii.edu/oprpm/docs/GP0913.pdf>.

Contractor shall furnish all equipment, personnel, labor and materials necessary to expeditiously and efficiently provide the services and products specified in the Contract. All such services and products shall be furnished to the University in accordance with the terms and conditions of the Contract or any amendments made thereto.

### 5.2 CONTRACT TERMINATION AND CONVERSION TO ANOTHER SYSTEM

Upon termination of the contract, the Contractor shall make available to the University, master files on a medium acceptable to the University that are compatible with the University's computerized system which contain complete training records, content and information for all user accounts (current and archived). The Contractor shall provide technical assistance to the University and/or the new Contractor if there is difficulty in converting the data to the new Contractor.

Contractor shall provide the complete history for all University user, instructor and admin accounts in a medium acceptable to the University.

Contractor shall provide all routine month-end services and reports pertaining to the LMS during the final month of the contract, and any documentation specified in the contract to the University before the contract expiration date.

On or after the first anniversary of the Contract commencement date, the University may at any time cancel or terminate the Contract for the convenience of the University, by giving at least NINETY (90) days written notice stating the date on which the Contract shall terminate. The University shall pay the Contractor for satisfactory performance until the effective date of such termination.

In the event that the University determines that the Contractor has materially breached the Contract, the University shall notify the Contractor in writing of the nature of the breach and shall give the Contractor SIXTY (60) calendar days during which the Contractor must provide a satisfactory cure. If after SIXTY (60) days, the University determines that the breach has

not been cured to the original level of satisfactory performance, the University may terminate the Contract by written notice. In such an event, the University may purchase or secure alternate services. The Contractor shall be liable for and shall reimburse the University for all costs reasonably incurred by the University, but only to the extent such costs exceed costs the University would have incurred if it had received services from the Contractor and only for so long as the Contractor agreed to perform under the Contract.

### 5.3 REFERENCES

The University reserves the right to contact the references named in REFERENCES (APPENDIX L), and to reject a proposal submitted by any Offeror whose performance on other projects has been unsatisfactory.

### 5.4 OPENING OF PROPOSALS

Proposals will be opened at the date and time specified in Subsection 1.4, SCHEDULE OF KEY DATES, or as amended, at the proposal submittal office. The proposal opening will not be open to the public. Proposals may be available for public inspection upon notice of award and shall be available for public inspection after the contract is signed by all parties.

### 5.5 TERM OF CONTRACT

The initial term of this contract shall be for THREE (3) years commencing from the date designated in the Notice to Proceed. Thereafter, the contract shall be renewable ONE (1) year at a time, for an additional TWO (2) years upon mutual agreement in writing NINETY (90) days prior to the annual renewal date without the necessity of rebidding, and provided further that the fees and costs remain the same or lower than the initial bid price.

### 5.6 PAYMENT TERMS

Payment by the University shall be made in accordance with Section 103-10, Hawaii Revised Statutes, and shall be subject to the terms and conditions of this contract. The Contractor shall be remunerated annually or monthly based on the pricing model awarded. Payment shall only be made upon submission of a properly executed original invoice and ONE (1) copy, indicating the contract number, to the Office of the Vice President of Administration, University of Hawai'i, 2444 Dole Street, Bachman Hall 109H, Honolulu, Hawaii 96822.

### 5.7 CONFIDENTIAL INFORMATION

Offeror shall designate in writing those portions of the unpriced proposal that contain designated trade secrets or other proprietary data that are to remain confidential. The

material designated as confidential shall be readily separable from the proposal in order to facilitate public inspection of the non-confidential portion of the proposal.

## 5.8 SOFTWARE

The University will execute Software License Agreements, if necessary, as long as the terms and conditions of the License Agreements do not conflict with the terms and conditions of this Request for Proposals. Inasmuch as the Contractor will be selecting the software for the University, the standard waivers of warranties of merchantability and fitness for a particular purpose shall not be accepted. The University shall be protected from claims of copyright infringement not occasioned by University modification of the software.

## 5.9 INSURANCE

Contractor shall maintain insurance acceptable to the University in full force and effect throughout the term of this contract. The policy or policies of insurance maintained by Contractor shall provide Combined Single Limit Coverage (bodily injury and property damage) in the amount of \$1,000,000.00 per occurrence and \$2,000,000.00 per project aggregate.

Insurance shall be in force the first day of the term of this contract. Each insurance policy required by this contract shall contain the following THREE (3) clauses:

- a. "This insurance shall not be cancelled, limited in scope of coverage, or non-renewed until after THIRTY (30) days' written notice has been given to the University of Hawaii, Director of Office of Procurement and Real Property Management."
- b. "It is agreed that any insurance maintained by the University of Hawaii will apply in excess of, and not contribute with, insurance provided by this policy."
- c. "The University of Hawaii is added as an insured as respects to operations performed for the University of Hawaii."

Clauses b and c are waived for any professional liability/errors and omissions liability insurance.

Contractor agrees to deposit with University, on or before the effective date of this contract, certificates of insurance necessary to satisfy the University that the insurance provisions of this contract have been complied with and to keep such insurance in effect and the certificates therefor on deposit with the University during the entire term of this contract.

The University shall retain the right at any time to review the coverage, form, and amount of the insurance required hereby. If, in the opinion of the University, the insurance provisions

in this contract do not provide adequate protection for the University, the University may require Contractor to obtain insurance sufficient in coverage, form, and amount to provide adequate protection. The University's requirements shall be reasonable but shall be designed to assure protection from and against the kind and extent of the risks which exist at the time a change in insurance is required.

The University shall notify the Contractor in writing of changes in the insurance requirements; and if Contractor does not deposit copies of acceptable insurance policies with the University incorporating such changes within SIXTY (60) days' of receipt of such notice, this contract shall be in default without further notice to Contractor and the University shall be entitled to all legal remedies.

The procuring of such required policy or policies of insurance shall not be construed to limit Contractor's liability hereunder nor to fulfill the indemnification provisions and requirements of this contract. Notwithstanding said policy or policies of insurance, Contractor shall be obligated for the full and total amount of any damage, injury, or loss arising from its acts or omissions with respect to this contract.

#### 5.10 PATENT INDEMNIFICATION

- a. The Contractor shall be required to and shall hold the University and its duly authorized representatives harmless against all demands, claims, actions or liabilities arising from the use of any article, process or appliance covered by letters, patents or copyrights used in connection with the contract. Any royalties due or becoming due for use of the article or process shall be paid by the Contractor and shall be deemed to be included within the bid amount and contract price.
- b. The Contractor shall defend, at its own expense, any action brought against the University, to the extent that it is based on a claim of infringement and that the Contractor will pay those costs and damages finally awarded against the University in any such action which are attributable to any such claim, but such defense and payments are conditioned by the following:
  1. That the Contractor shall be notified properly, in writing, by the University of any notice of such claim;
  2. That the Contractor shall have sole control of the defense of any action on such claim and all negotiations for its settlement or compromise; and
  3. Should the article, process or appliance become, or in the Contractor's opinion be likely to become, the subject of a claim of infringement, that the University shall permit the Contractor, at its own expense, either to procure for the University the right of continued use, or replace or modify the same so that they become non-infringing, or remove the article or appliance or discontinue the process.



5.11 CONTRACT INVALIDATION

If any provision of this contract is found to be invalid, such invalidation will not be construed to invalidate the entire contract.

5.12 CANCELLATION OF RFP

The University reserves the right to cancel the RFP when in the University's opinion, such cancellation is in the best interest of the University.

5.13 LITIGATION

To the best of its knowledge, the Contractor, its officers, directors, stockholders, agents, or employees are not subject to, or threatened by, any litigation or administrative proceeding before any court or administrative body that would have a material adverse effect on the Contractor's ability to perform under the contract.

5.14 CONFLICTS OF INTEREST

The Contractor, its officers, directors, stockholders, agents, or employees shall have no conflict of interest which impairs the Contractor's ability to fully perform the duties and responsibilities under the contract.

5.15 NEGOTIATIONS

If the University finds that it would be in the University's best interest to reduce or expand the scope of work, the successful Offeror may be required to enter into negotiation sessions for contract terms prior to entering into a formal contract.

5.16 CONFLICTS

This RFP, together with the successful offeror's proposal, shall become part of the terms and conditions of the resulting contract, provided that in the event of any conflict between the terms of this RFP and the proposal, this RFP shall control.

5.17 ESCALATION CLAUSE

The Contractor shall not be allowed to request adjustments to the contract price unless offering additional services pursuant to Section 2.4.

**APPENDIX A  
PROPOSAL LETTER  
UNIVERSITY OF HAWAII**

We propose to furnish and deliver any and all of the deliverables and services named in the Request for Proposals (RFP) to Provide Learning Management Software Services for the Office of the Vice President of Administration, University of Hawaii, Honolulu, Hawaii, RFP No. 19-0237, for which prices shall be negotiated.

It is understood that this proposal constitutes an offer.

It is understood and agreed that we have read the University of Hawaii's specifications described in the RFP and that this proposal is made in accordance with the provisions of such specifications. By signing this proposal, we guarantee and certify that all items included in this proposal meet or exceed any and all such specifications.

We agree, if awarded the contract, to deliver goods or services which meet or exceed the specifications.

Respectfully submitted,

\_\_\_\_\_  
Legal Name of Offeror

\_\_\_\_\_  
Date

\_\_\_\_\_  
Authorized Signature (original)      (Typed Name)

\_\_\_\_\_  
Title

\_\_\_\_\_  
Street Address

\_\_\_\_\_  
Email Address

\_\_\_\_\_  
City, State, Zip Code

\_\_\_\_\_  
Telephone No.

\_\_\_\_\_  
Social Security OR Federal Tax Payer ID No.

\_\_\_\_\_  
Fax No.

\_\_\_\_\_  
Remittance Address (if different from street address)

\_\_\_\_\_  
Hawaii General Excise Tax License No.

\_\_\_\_\_  
City, State, Zip Code

\_\_\_\_\_  
Location of Offeror's Plant

Offeror is:      ☐ Individual    ☐ Partnership    ☐ Corporation\*    ☐ Joint Venture

State of Incorporation:    ☐ Hawaii    ☐ Other:

Is Corporate Seal Available In Hawaii:    ☐ Yes\*\*    ☐ No

\*      Attach to this page evidence of authority of the above officer to submit an offer on behalf of the corporation, giving also, the names and addresses of the other officers.

\*\*      If yes, affix corporate seal.

## APPENDIX B PRICING SCHEDULE

**All Offerors shall provide their pricing on the Offer Price Form. See Section 3.3 Pricing Schedule for details. Provide a response for the following:**

- A. Provide pricing information, if any, for the following additional services:
  - 1. Conversion fees.
  - 2. Upgrade fees (clearly define to which pricing model the fees apply).
  - 3. Start up and specialized content fees for per course model.
  - 4. Additional customization fees (branding and other changes after implementation).
  - 5. SSAE Audits.
- B. Provide tiered pricing schedules, if offered. The lowest tier shall be the offer price listed in the Price Offer Form for 3000 active users. Increments should progressively increase to 10,000 active users.
- C. Describe any pricing options not included in the Price Offer Form that may be appealing or advantageous to the University. While any pricing options provided here will not be used for evaluation purposes, the University reserves the right to award to the highest evaluated Offeror based on the pricing structure that is deemed to be the most advantageous.
- D. Describe how you arrived at the online and on-site training costs provided in the Price Offer Form. It should be noted that the University may only reimburse for air travel other than first class and reasonable hotel accommodations. Meals and incidentals shall not be charged to the University.
- E. **List below any other charges/discounts that might occur which have not been listed in the Price Offer Form or above. Please define clearly and estimate the amount. Any charges or services not addressed in this pricing schedule will not be allowed in the course of the contract unless the scope of services is expanded by the University.**

All fees and charges specified herein shall include all applicable taxes and the furnishing of all labor, materials, supplies, and equipment required for the learning management system services specified herein.

## **APPENDIX C PROJECT NARRATIVE**

Narrative should describe your understanding of the desired LMS solution, a description of the proposed plan to implement an LMS from scratch and the benefits that will accrue to the University Hawaii System as a direct or indirect result of its performance of this contract.

### **Section 1: Project Summary and Overall Approach**

### **Section 2: Background Information**

### **Section 3: Timeline and Milestones w/ Responsibilities**

### **Section 4: Benefits to the University**

## **APPENDIX D OFFEROR'S GENERAL SERVICES**

Describe your ability to provide the General Services requested by the University. Ensure your response addresses all desired elements from Scope of Work, Section 2.2.A and answers the questions below.

Describe in detail the hosting options and infrastructure available for the learning management system.

Describe how you will ensure the University always has the latest version of your solution, include the update delivery models available for system upgrades (version updates, patches, service packs, etc.) and end-user impact. Include how the LMS supports operating system, server, learning environment, and third-party component patches within THIRTY (30) days of patch release.

Describe in detail how the Offeror supports and implements IMS Global Standards.

Describe in detail how the Offeror ensures compliance with industry standards, statutory and regulatory compliance obligations.

List all supported file formats for data feeds to and from the LMS.

Describe in detail your auditing process including how to maintain compliance with SSAE standards and how often third-party security audits are conducted and how they are shared with institutional partners.

Describe the process and frequency of vulnerability testing including information on internal and third-parties responsible for testing.

Describe LMS guaranteed uptime in detail including availability guarantee and credit allowances.

Describe LMS data center infrastructure, data protection, load balancing and redundancy protocols.

Describe your process for monitoring and addressing security incidents; include the process and timeline by which the University is notified.

Describe your disaster and security recovery plans; include the steps to be taken after an event or breach takes place.

Describe how data is backed up and failsafe plans to ensure continuity of service.

Describe your testing and staging environments; include how they are accessed and the migration process to production.

Describe how the LMS stores and encrypts data including sensitive data (confidential or

proprietary). Provide the LMS's encryption methods and/or its ability to interface with encryption software during communications.

Describe in detail your data integrity controls; include how you audit data transactions.

Describe LMS data retention policy, course activity data backups and availability to be restored to end users.

Describe the LMS's archiving functionality for courses, users and training records.

Describe in detail the customization options available to the system administrator, include how the LMS allows customizable institutional and program branding.

## **APPENDIX E INTEGRATION SERVICES**

Describe your ability to provide the Integration Services requested by the University. Ensure your response addresses all desired elements from Scope of Work, Section 2.2.B and answers the questions below.

Describe how your solution uses current API and LTI standards to integrate with other learning applications.

Describe your API Library; include all existing API in the library that is relevant to this solicitation. (Offeror may include an electronic file attachment to its emailed submission and reference the file in the hard copy submission.)

Describe how your solution leverages Webhooks to push information to various integrated applications.

Describe your experience integrating with human resource systems similar to system used by the University; include how these integrations have benefited customers.

Describe your experience integrating with customer relationship management systems; include how these integrations have benefited customers.

Describe any other data management system you have experience integrating with and how that integration benefited the customer.

Describe your experience and or ability to integrate with Shibboleth Identity Provider services for single sign on use.

Describe your ability to integrate Google and its suite of productivity and collaboration tools.

Describe your solution's integrations that allow for:

- Discussion (forum and chat).
- File exchange/ file sharing.
- Web video conferencing.
- Calendaring.

Include if any of these services are offered through the LMS and which integrations you suggest to meet these needs.

## **APPENDIX F OFFEROR'S CONTENT MANAGEMENT**

Describe your ability to provide the Content Management options requested by the University. Ensure your response addresses all desired elements from Scope of Work, Section 2.2.C and answers the questions below.

Describe in detail the content authoring tools, including content creation, if any, provided by the LMS. List the third-party content integrations that are allowed.

Describe the content and media formats that the LMS supports. Include the types of content that can be imported from external sources or created within the LMS and exported. Describe the LMS's process to import and export content.

Describe in detail the web conferencing and live video capabilities of the LMS. Include the hardware requirements, integration requirements with third-parties to provide this function and the process to record and export videos.

Describe in detail instructor options for allowing and assigning access to content. Include the parameters for allowing access by teaching style (mastery, sequential etc.) and user.

Describe in detail the LMS content management tools offered including, but not limited to master course templates, third-party content repositories and curriculum mapping tools.

Describe how master course templates are applied across the LMS.

Describe the process for combining or merging courses or parts of courses within the LMS; include the process for bulk course copying.

Describe in detail all assessment tools available within the LMS and the options for importing third-party tools. Include how assessments can be exported.

Describe in detail how the LMS allows instructors to align course, program, and/or University learning outcomes to various content artifacts within the LMS.

Describe the survey and feedback tools available through the LMS. Include what tools are available at a system level, program level and course level.

Describe in detail the LMS capability to create, track and manage certification requirements. Include the retention policy of expired certifications and the effect of changing certification requirements while users are certified under previous requirements.

Describe in detail how your LMS solution accommodates certification program tracks/paths with prerequisite certification requirements. Example: you must have entry certification in order to take associate certification courses and you must have associate certification to take professional certification courses and so on.



Describe in detail the ability of your LMS to import externally earned credits and proof of completion documents to be put toward certification.

## **APPENDIX G**

### **OFFEROR'S USER EXPERIENCE, ACCESSIBILITY AND MANAGEMENT**

Describe your ability to provide User Experience Accessibility and Management requested by the University. Ensure your response addresses all desired elements from Scope of Work, Section 2.2.D and answers the questions below.

Describe how LMS user interface and functions are responsive and maintained across all supported desktop, mobile platforms, and browsers. Include a list of the mobile devices the proposed LMS supports.

Describe differences between the functionality of the LMS website and its mobile application.

Describe whether the LMS supports delivery of multimedia and streaming video to mobile devices including whether Flash is required and for which devices.

Describe if LMS requires any browser plug-ins, add-ons/extensions, and cookies and why are they needed.

Describe in detail how your company stays in compliance with Web Content Accessibility guidelines.

Describe the extent to which the LMS is accessible to people with disabilities including people who are blind or have low vision, are deaf or hard of hearing, have mobility or dexterity limitations, and have speech impairments.

Describe the customization options provided to users when creating a profile and interacting with the system.

Describe the presentation options for course offerings (i.e. catalogs); include the process for selecting and enrolling in an on-demand and live web course.

Provide images and a brief description of the user progress tracking system or dashboard provided by the LMS. Include the customization options for these displays.

Describe in detail how the LMS supports interaction and collaboration through communication. Include a description of the various tools provided/supported for one-on-one and group discussion.

Describe the systems announcement/notification ability and how an administrator would leverage this to keep users informed of system updates.

Describe the LMS's live video and recording capabilities. Include the number of participants allowed in a web conference and the export capabilities for recorded conferences.

Describe the LMS's pre-defined standard roles and the capabilities to customize roles.

Describe the process for assigning permissions for pre-defined standard and custom roles.

Describe the options for management of user enrollments to include bulk enrollment of users, creation of user accounts, and deletion or deactivation of user accounts.

## **APPENDIX H OFFEROR'S SUPPORT SERVICES**

Describe your ability to provide Support Services requested by the University. Ensure your response addresses all desired elements from Scope of Work, Section 2.2.E and answers the questions below.

Describe dedicated LMS personnel made available to the University to ensure successful account and system management.

Provide the resume or capability statements for the personnel described above and for the implementation team. Include at least THREE (3) examples of similar efforts they have accomplished and the contact information for those references.

Describe in detail the roles and responsibilities of the project manager including their reporting and deliverable obligations to the University.

Describe the LMS implementation model and timeline. Clearly separate the roles and responsibilities of the implementation team and of the University.

Describe in detail your approach to institutional stakeholder training.

Describe in detail the resources provided to assist in the training of users, instructors and administrators. Separate resources into implementation and post implementation categories.

Describe in detail the system administration support model for post-implementation technical issue resolution. Include escalation protocols and procedures, support hours, response times and reporting deliverables.

Describe in detail the customer support model for post-implementation non-technical issue resolution. Include escalation protocols and procedures, support hours, response times and reporting deliverables.

Describe the resources available to support third-party developers that provide API and LTI integrations.

## **APPENDIX I OFFEROR'S REPORTS**

Describe your ability to provide the Reports requested by the University. Ensure your response addresses all desired elements from Scope of Work, Section 2.2.F and answers the questions below.

List available data reports, analytics, and data visualization features available within the learning management system (LMS) by user role (Administrator, Instructor, and User).

Describe the ability to produce customizable data reports from within the LMS.

Describe how data reports and analytics within the LMS may be exported and list supported formats (e.g. Excel, CSV).

## **APPENDIX J OFFEROR'S LMS ROADMAP**

Provide a narrative that outlines the anticipated improvements to the LMS in accordance with Scope of Work 2.2.G, LMS Roadmap.

## **APPENDIX K OFFEROR'S TRIAL ACCOUNTS**

Provide the Trial Account information and instructions required by the University. (Refer to Scope of Work, Section 2.2.H)

## APPENDIX L REFERENCES

Indicate below a listing of at least FIVE (5) references who can attest to the reliability of the Contractor's service and personnel. The University reserves the right to contact the references for additional information.

	<u>Client</u>	<u>Address</u>	<u>Person to Contact and Phone Number</u>
1.			
2.			
3.			
4.			
5.			