CALBRIGHT COLLEGE

COMPETENCY BASED LEARNING MANAGEMENT SYSTEM

Request for Proposal No. 23-004

Release Date: May 24, 2023

Filing Deadline: No later than 5:00 PM PDT on June 28, 2023

Filing Method: File proposals electronically through the Calbright College's PlanetBids Bid Portal. The link to the Bid Portal may be found at:
https://www.planetbids.com/portal/portal.cfm?CompanyID=40988

Contact: Calbright College
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1. Background

Calbright, the California Online Community College ("Calbright College" or "College") is part of the California Community Colleges system (Education Code section 75000-75012) and is California's 115th community college. Calbright College California's only statewide, digital community college offers skills-based credentials, certificates, and preparation for in-demand jobs, with flexibly-paced programs and wraparound supports designed specifically for adults without degrees. Calbright is for Californians who want the skills that open access to better jobs, and whose lives, jobs, schedules, and family responsibilities do not fit typical semester-based course structures and timelines. Through its programs and services, the College is committed to increasing economic mobility and closing equity gaps for working adults who lack easy access to traditional forms of higher education, providing tangible economic value for both working adults and hiring managers

2. Request for Proposals

Calbright College is requesting proposals from responsive, responsible, and qualified individuals or firms ("Proposers or Proposer ''") to provide Calbright with a Competency Based Learning Management System. Calbright College uses the word "firm" throughout this Request for Proposals (RFP) but will also accept proposals from qualified individuals.

Respondents to this RFP shall submit responses electronically in PDF format via the PlanetBids Bid Opportunities portal. Respondent is responsible for confirming all required documents are submitted and uploaded correctly (e.g. file is not corrupt or damaged). If Calbright is unable to open an attachment because it is damaged, corrupt, infected, etc. it may disqualify Proposer's submission. Should you have any issues submitting documents, please contact PlanetBids at 818-992-1771. RFP responses shall be submitted electronically to the PlanetBids Bid Opportunities Portal, found at:

https://www.planetbids.com/portal/portal.cfm?CompanyID=40988

All responses must be received by **5:00 PM PDT, June 28, 2023**

2.1.   Pre-Proposal Meeting (if applicable)

Calbright will not be holding a pre-proposal meeting for this solicitation.

2.2.   Tentative Timeline - Calendar of Events

Event	Date
RFP Posted	May 24, 2023
Requests for Clarification due	June 7, 2023 5:00 PDT
RFP Responses due	June 28, 2023 5:00 PDT
Interviews	Starting the week of August 9, 2023
Sandbox Testing Environment	August 30, 2023 to November 8, 2023
Tentative Board Approval	December 2023

*These dates are tentative and subject to change by Calbright.

2.3.   Requests for Clarifications

All questions and requests for interpretations or clarifications, either administrative or technical, must be submitted in writing to Calbright through PlanetBids by selecting the Q&A tab. Questions sent directly to Calbright staff will not be addressed and you will be directed to submit your question(s) online. All requests must provide a sufficient amount of information, such that Calbright can craft an appropriate response, based upon the contents of a request.

All questions properly submitted will be answered in writing through PlanetBids. To ensure a response, questions must be received through PlanetBids by **5:00 p.m. local time on June 7, 2023**.

Calbright responses will be provided in writing to all prospective Proposers via Calbright's online bid portal on PlanetBids Q&A tab.

2.4.   Interviews

Based on rankings, Calbright will invite a short list of Proposers to participate in interviews and/or demonstrations. When interviews and/or demonstrations are conducted, the Evaluation Committee will then evaluate the short-listed Proposers solely on the interview and/or demonstration and may recommend all or a short list of Proposer(s) who ranked highest to the sandbox testing environment. The interview may consist of a short presentation/demonstration by the Proposer after which the Evaluation Committee will ask a series of questions related to the solicitation. The Committee will use pre-established criteria during the interview to score and develop a recommendation to move on to the sandbox testing environment phase. No Proposer shall be entitled to or otherwise guaranteed an interview with Calbright.

Calbright has identified the week (or weeks) listed on the Tentative Timeline - Calendar of Events for interviews. Proposers will be asked to keep this date available, as no other interview dates will be available. Proposers who are unable to attend their interview as scheduled may be eliminated from further participation in this procurement process.

2.5.   Sandbox Testing Environment

Based on rankings from Section 2.4 Interviews, Calbright may, at its sole discretion, invite a short list of Proposers or all previously short-listed Proposers during the interview and/or demonstration process to participate in the sandbox testing environment. The Evaluation Committee will then evaluate the short-listed Proposers solely on the sandbox testing environment and recommend the Proposer who ranked the highest. The Evaluation Committee will use pre-established criteria during the sandbox testing environment to score and review commentary by Calbright College members and develop a final recommendation. No Proposer shall be entitled to or otherwise guaranteed to participate in the sandbox testing environment.

Proposers will be required to establish three (3) online sandboxes for use by Calbright College members. Calbright College is providing two (2) weeks worth of course content for two (2) courses. This content is provided to make it easier for the Evaluation Committee and members of Calbright College to compare and contrast implementation across different products as well as a starting point for experiencing tools and other product interactions. Proposers are given "creative freedom" and encouraged to design and implement this content in their system

following best practices for their respective product. This provides the Proposers an opportunity to showcase their product. Proposers will also include a model course of their own creation to highlight or demonstrate whatever features they wish.

2.6.   Addenda

Calbright reserves the right to amend the RFP at any time. All changes to this RFP will be made by issuance of written addenda. Automatic notification of addenda is sent to Proposers via the PlanetBids Opportunities Portal.

Proposers shall acknowledge receipt of all addenda as instructed by Calbright's PlanetBids Bid Opportunities portal. Failure to acknowledge receipt of all addenda may cause the proposal to be considered non-responsive to the RFP requirements.

2.7.   Proposal Due Date

Proposals must be submitted electronically on or before **5:00 pm PDT, June 28, 2023**. Proposals submitted by hand, any postal carrier, fax or email will not be accepted. Proposals received after the due date will be disqualified.

Proposers are strongly encouraged to upload their electronic responses on Calbright's Bid Opportunities portal significantly before the RFP proposal due date to avoid last-minute technical issues. Should Proposers have any technical problems or questions regarding electronic submittal, please contact PlanetBids Customer Service at 818-992-1771.

2.8.   Proposed Contract Term

The initial term is anticipated to be from February 2024 to February 2025. Thereafter, Calbright will have the option, at its sole discretion, to renew the agreement, if any, for up to two (2) additional two-year terms with a max term length of five (5) years. If the parties are unable to reach an agreement, Calbright, at its sole discretion, will not move forward with the renewal option.

2.9.   Debriefings

See Attachment A General Conditions.

2.10. Protests

See Attachment A General Conditions.

3. Scope Of Services/Work

The purpose of this Request for Proposal (RFP) is to solicit proposals from qualified firms interested in providing enterprise learning management system. The core of the LMS is the course management system or what Calbright College calls the learning management system (LMS). In order to participate in this RFP, a vendor must offer an enterprise learning management system (including, but not limited to, open source providers). A successful LMS vendor must be established in the public higher education market with a record of its product being used as a hub for other tightly integrated instructional/academic technology tools that are used by universities twenty-four (24) hours a day, seven (7) days a week, three hundred sixty-five (365) days a year (24/7/365). The LMS core tools and functionality are central and very important to the competency-based, self-paced and modularized functionalities and activities of faculty, staff and students, Calbright College considers the Learning Platforms and Services as an ecosystem of instructional technology tools and services.

Calbright College expects that:

- The LMS must be used to manage all courses at Calbright College, a fully online competency-based (CBE) self-paced and modularized program.
- The LMS must integrate with Anthology Student Information System (SIS) or more generally can integrate with an SIS Application Programming Interface (API), providing a mechanism for loading courses offered each term, student enrollments, instructor information, cross-listed courses, etc.
- The LMS uses standard authentication protocols for single-sign-on and standard integrations, Learning Tools Interoperability (LTI), Quality Test Interoperability (QTI).
- As a mission critical resource for our institution, the LMS is used 24/7/365 by faculty and students, thus successful vendors are expected to propose products that demonstrate very low incidences of downtime and 99.99% guaranteed uptime with support that is available for tiered escalation 24/7/365 every hour of every day for faculty, staff and students. Penalties will be specified for downtime beyond agreed upon levels and clearly defined Service Level Agreement (SLAs) table.
- Proposer shall provide around-the-clock support, documented with clearly defined tier levels and escalation paths 24/7/365 no matter the time of day or year including easy to use ticketing system and dedicated support.
- We consider the LMS an enterprise-level system and we also know that it serves as the hub to many more applications and systems (local and Internet).

Strategic and standard integrations with other Learning Platforms and Services (e.g., portfolios, assessments, analytics, outcomes, course evaluation tool, etc.) are expected.

Calbright College seeks to collaborate with providers who genuinely expect to work hard to maintain ongoing relationships, discuss planning and product roadmap(s), as well as negotiating priorities for future development. In addition, the providers must offer superior customer service and professional services for the greatest success of Calbright College faculty and students who are depending on this critical LMS ecosystem in the learning and teaching environment beyond the 24/7/365. This includes the following expectations:

- To engage with Calbright College in becoming the most technologically advanced CBE higher education system in the U.S. measured by the breadth, depth, and quality of use in the instructional environment.
    Competency-based education (CBE) provides a flexible approach to teaching and learning based on the application of knowledge and skills that are transparent and measurable. Progression is determined by demonstrated mastery of what students are expected to know (knowledge) and be able to do (skills), rather than hours spent in a classroom.
    At Calbright College, an equity-based approach to CBE teaching and learning exists across all programs offered. All curricula provide a flexible and engaging experience focused on the needs of adults balancing competing responsibilities. To meet its mission, the College designs CBE programs to be "online, flexible, affordable, skills-based." This approach enables students to work at their own pace, moving more quickly through familiar material by demonstrating mastery of concepts, and taking the time they need when the content is more challenging, or when life gets in the way.
- To serve the 21st Century student taking into account mobility, rich media, push notifications, social media, and other contemporary technological advances in software and hardware.
- To discover and create with us the best CBE practices and greatest impact, giving faculty and students feedback, providing readily available and visible dashboards based on course, faculty and student activities and progress.
- To leverage Calbright College for the widest use, greatest flexibility, best innovation and cost efficiency (both in labor time and money).
- To provide quarterly reports responding to specific prioritized Calbright College issues, training, needs planning, and vision for the future.
- Ultimately, to join Calbright College in strengthening our Learning & Innovation CBE infrastructure for future growth and expansion.

This RFP is led by the Learning & Innovation office as a collaborative investigation for all of Calbright College. The evaluation committee will review, analyze and evaluate the RFP responses and strategically plan next steps for the future implementations.

Calbright College is requesting proposals to identify enterprise learning management system. The vendors must be prepared, serious and committed to working with Calbright College.

We are looking for providers who know and understand the value of engaging with their clients for true collaboration, and are flexible in addressing their clients' needs for the greatest success of the company and the participating universities.

We are seeking vendors who have an enterprise level LMS as a minimum, (including, but not limited to, open source providers), who may also offer other products and services that extend into our ecosystem.

4. Evaluation Criteria And Scoring

The award of an agreement pursuant to this RFP will be determined by factors other than price/cost alone. Calbright's sole purpose in this procurement process is to determine from among the Proposers which proposal is suited to meet the College's needs. Any final score or evaluation does not imply that one proposal is superior to another, it simply reflects our judgment regarding the proposal that offers the best overall response to our current needs. Calbright will evaluate proposals based on the qualifications and criteria listed below.

4.1. Minimum Qualifications

User Provisioning and User Management Requirements. The LMS must have the capability to provision and manage users, including the ability to create, modify, and delete user accounts. The system must also have role-based access control and support for single sign-on.

System Level Requirements. The LMS must have high availability, reliability, and scalability. The system must be able to handle a large number of concurrent users and have disaster recovery and backup mechanisms in place. The product must be able to integrate with other systems and its interoperability with existing infrastructure.

Accessibility Requirements. The LMS must meet accessibility requirements as specified by Calbright College. This includes compliance with accessibility standards

such as WCAG 2.1, support for assistive technologies, and the ability to customize the user interface.

Student Experience Requirements. The LMS must provide a positive and engaging learning experience for students. This includes features such as an intuitive user interface, mobile compatibility, multimedia support, and personalized learning paths.

Course Creation & Management Requirements. The LMS must have the capability to create and manage courses, including the ability to import and export course content. The system should also support collaboration and workflows for course creation, management, and approval.

Competency Based Requirements. The LMS must support competency-based education. This includes the ability to define competencies, design assessments, track learner progress, and provide feedback to learners. The product's ability to demonstrate mastery of specific competencies or skills, use of clearly defined and measurable learning outcomes, personalized learning pathways, and frequent assessments to measure progress towards mastery. The product's ability to support the development and tracking of competencies, flexibility in designing personalized learning paths, and robust assessment and reporting features.

Data and Reporting Requirements. The LMS must have the capability to manage data and provide reports. This includes features such as data visualization, custom reporting, and integration with third-party systems.

Compliance Requirements. The LMS must comply with industry standards and regulations, including data privacy, security, and accessibility standards. The system must also have the capability to audit logs and provide transparency to stakeholders.

Proposer must respond to and submit the minimum qualifications document (Attachment F - LMS Specifications Document) as a separate attachment to this RFP. See Attachment F - LMS Specifications Document.

4.2.   RFP Evaluation Criteria Scoring Standards

Selection of an individual and/or a firm will be based on demonstrated competence and on the professional qualifications necessary to meet Calbright College's needs to provide the product and perform the

services as described in this RFP. Calbright intends to utilize the following criteria in evaluating responses to this RFP but the College reserves the right to make modifications to the evaluation criteria scoring, weight and/or priority prior to the evaluation of responses.

4.3.   RFP Scoring

Scoring	
Responsiveness and Quality of the Proposal	10
Clarity and Completeness of the LMS Specifications, General and Scenario Narrative Responses	30
Quality and Relevance of the Client Training, Services, Project Management and Consulting	10
Ability to Articulate How the LMS will Meet the Organization's Specific User Experience Requirements	20
Ability to Demonstrate how the LMS meets Calbright Colleges Needs and Priorities for a Competency Based Requirements.	20
Reasonableness and Competitiveness of the Proposed Budget	10

The Evaluation Committee will evaluate the proposals and score the proposals to identify the highest-rated proposal(s). The Evaluation Committee will make a final recommendation to the Board of Trustees to award a contract. The Evaluation Committee may recommend a proposer that is not the highest rated and provide justification for the recommendation to the Board of Trustees.

5. Proposal Format and Requirements

Proposals shall not include any unnecessarily elaborate graphics, artwork or promotional materials. Lengthy narratives are discouraged. The proposal should be brief and concise. Appendices should provide information directly relevant to the needs of the solicitation and not consist of the Proposer's general marketing materials.

Proposals must be submitted in PDF format in 12-point Arial or Calibri font, excepting embedded features and/or attachments such as infographics which may necessitate alternate visuals. All pages must be sequentially numbered.

5.1. Proposal Format

Table of Contents, Cover Letter and Executive Summary
In this section (maximum four (4) pages), include the following:

  A. Table of Contents: Provide a table of contents as the first page of the proposal which itemizes the Proposer's submission.
  B. Cover Letter: Provide a cover letter that provides an overview of the Proposer's general expertise, experience, and approach to performing the Scope of Services described in this RFP. The cover letter must be signed by a representative fully authorized to bind the firm or entity to the terms and conditions herein, and include contact information in the event questions arise regarding the proposal.
  C. Executive Summary: Provide a summary of the proposed approach to the topics identified in Scope of Services, the strengths of the proposed project team, and why your firm should be selected.

Company Background Information
In this section (maximum two (2) pages), include the following:

  A. Legal entity name, addresses, telephone numbers of the principal office (national headquarters) and local office. Include the same information if services will be provided from additional locations.
  B. Year established and company history.
  C. Business entity status (i.e., partnership, corporation, LLC).
  D. Indicate if Proposer has defaulted in its performance on an agreement during the past five (5) years which has led the other party to terminate the agreement and, if so, the identity of the parties involved and the circumstances of the default or termination.

General Narrative
In this section (maximum 5 pages), include the following:

  1. Please describe how your Learning Platforms and Services (LMS) including the LMS is capable of hosting and supporting Competency Based Education (be specific).

2. Please describe broadly your company, strategy and your Learning Platforms and Services (LMS) including the LMS, standard integrations, migration services, modules, extensions, products, their roadmaps and services that extend into the LMS. Please address where your products fit into your overall business.
   1. What services do you use for cloud and managed hosting?
   2. Please describe the technical requirements and architecture of each option.
3. Describe the partnerships with other third parties that are being included in responding to this RFP, if any.

RFP Specific Response Narrative

In this section (maximum 10 pages), include the following:

The Attachment F - LMS Specifications Document provides yes or no response to the questions regarding minimum qualifications and features. Here, asks more qualitative questions and provides the opportunity to elaborate on any item in Attachment F - LMS Specifications Document.

Competency Based Requirements

1. Please explain how your product handles courses such as asynchronous competency based learning (be specific and share your competency branching and mapping functionalities).
2. Please list and describe your product's gradebook functions. What levels of customization are possible for both course and individual assignments such as rubrics?
3. Please list and describe your product's assessment options. Please note how you handle group projects, peer review and feedback, and instructor versus peer feedback in assessments.
4. Please summarize your company's strategy for implementing new modalities and learning innovations such as adaptive, competency based, and how those will exist alongside traditional coursework. Please indicate if there are opportunities for faculty collaboration.

Course Creation & Management Requirements

5. What security options are native in your product for assessments? What auditing tools exist for instructors? For other roles?
6. Please provide a list and samples of reports included in your product for various audiences (such as faculty, administration, etc.). Please submit report examples of real campus implementations (blackout institution's name if necessary).

7. Please provide a general description of the levels of help provided and for what audience it's intended (i.e. faculty, students, instructional designers, technical staff, etc.).
8. Please describe your levels of client support and describe any additional costs associated.
9. Please summarize your company's mobile strategy. Provide a link or other official documentation as appropriate.
10. Please describe how mobile users can access your product. Mobile friendly website? Mobile app? How do users obtain the mobile app? What configuration is required prior to mobile readiness if any?
11. Please list and describe your product's user roles (student, instructor, graduate assistant, teaching assistant, etc.).
12. Please explain if and how users can make LMS content visible to others. For example, can a student embed a submitted assignment into their personal website or share it through social media?
13. Please explain how badges are created and by whom. Do the badges show up outside the LMS? Can they be integrated into other systems?
14. Please describe how your product handles web based content. Include a detailed description of permissions, who manages what access, and what content can be displayed across devices (i.e. desktop, tablet, mobile).
15. Please describe how your product handles both text and code based input for both courses, assessments, and assignments.

Data and Reporting Requirements

16. Please list supported database reporting tools.
17. Does Calbright have direct access to its data? If so, please list supported database management systems.

System Level Requirements

18. Please provide your security compliance documentation/certifications.
19. Upon what technology stack is your product built?
20. Please describe your products' APIs by type and include support levels provided for testing, using and troubleshooting. What are your API throttling limits? Please supply your API documentation for review.
21. Please describe your company's event systems? How can data be pushed back to Calbright instead of constant polling of an API?

22. Which versions of LTI do you support? Recently certified by IMS Global?
23. Please describe your support for clients integrating with other tools and other vendors.
24. Please describe your certification or other "guarantees of quality" when integrating with other vendor products.
25. Please explain how your users manage communication in your product. Make sure you specify by type of communication including, but not limited to, mobile push notifications and email as well as what triggers the communication such as a course announcement or a grade being posted.
26. Please summarize how your company views data ownership. Provide a link or other official documentation as appropriate.
27. Please summarize your company's hosting and cloud strategy. Provide a link or other official documentation as appropriate.
28. Please summarize your company's advertising policy, if any, to students or within your product. Provide a link or other official documentation as appropriate.
29. If your product provides an app store or equivalent, please explain how apps are managed, installed, uninstalled, etc. Provide a link or other official documentation as appropriate.
30. Please describe your disaster recovery plans and how you work with institutions to address issues and/or concerns.

Accessibility Requirements

31. Please explain how your product handles languages other than English including multi-language environments.
32. Please describe your company's accessibility policies. How do you stay up to date on best CBE practices?
33. What priority does accessibility have in your product roadmap? Will you release a feature that is not yet accessible?
34. Please provide a link to your accessibility documentation for users or accessibility specialists.
35. Please describe or provide a link to any known accessibility issues along with a timeline for fixing.
36. Please provide any additional accessibility-oriented documentation and uploaded as an appendix to the proposal, thiswill not count towards the maximum page limit (e.g. White Papers, Case Studies, Tutorials, FAQs, Best Practices, web sites, external links, etc.).

Scenario Questions

In this section (maximum 5 pages), include the following:

1. Please describe how you would migrate a CBE course from a competitor's LMS. Be sure to explain how you handle unsupported functions.
2. Please describe how you restore a CBE course from an instructor's perspective (include backup and restore process). Include what options are available (resources, assessments and gradebook preferences).
3. Please describe how a faculty member can create a new course with competency branching and mapping that can be used for multiple courses and within a content pathway.
4. Please describe how a faculty member can create a rubric for grading a written assignment and then use that rubric in multiple courses. Show student view of rubric grades and feedback. Describe how a faculty member may share the rubric with other faculty members through the LMS system.
5. Please describe how a faculty member could organize and deliver their course assessment using mobile devices/technologies that allow for rich student engagement and evaluation.
6. Please describe how peer-to-peer (student-to-student), and student-to-group, feedback/rating are applied in a variety of graded activities. Include any grading features available for faculty to provide a grade for quality of feedback and the completion of the feedback activity.
7. Describe the steps that show how a faculty member will create an exception or override for a quiz attempt to facilitate an accommodation for a student with disabilities.
8. Describe how to generate reports (if available) for the following:
   1. Progress and pacing mapping of student learning
   2. View of all activities or resources a student has viewed and completed
   3. Multi-course view of the student's activities/assessment
   4. View report for quiz attempts
      a. Overall attempts for all students in the course
      b. Individual quiz attempts
      c. Stats such as which students selected the wrong answer, average, deviations, etc.

NOTE: All products moving to the interview phase will need to have their Voluntary Product Accessibility Template (VPATs) validated by a third party vendor. You must Provide a VPAT for each interface and each population (student, faculty, and admin) in your product.

Client Training, Services, Project Management and Consulting
Proposer is required to address each of the following questions below in order, addressing the vendor's support environment, client relationship and collaboration.

In this section (maximum 2 pages), include the following:

A. What kind of client relationships do vendors have with other university systems/consortiums?
B. Does the company have Product Advisory boards or equivalent? If so, can Calbright College join the Product Advisory Board?
C. How does the vendor encourage Client Community Engagement? How? When? Where? Formats?
D. Is training provided free? Tutorials? Documentation?
E. Is there a menu of Training Services? Customer Advocacy Services?
F. Does the vendor provide Project Management and Consulting Services? Menu?
G. How do users/administrators submit trouble-tickets? How are trouble tickets escalated to upper tiers? (around the clock)?
H. How is the status of trouble tickets communicated and to whom are they communicated?
I. How does the company announce upgrades and/or feature releases?
J. How much notice is given to campuses before a new version is released?
K. What are the typical product development cycles?
L. How much advance warning does the company give before it stops supporting old versions?
M. Please describe some common consulting projects done with other clients supporting CBE. What were the associated fee breakdowns on those projects?
N. How are feature requests collected and status communicated?
O. How is the status of the system conveyed (uptime, downtime / planned outages, and recognized problems). Beyond the web interface, do you provide multiple channels of communications such as a Twitter feed? Do you have a service status page?

P. What does the company provide for 24/7/365 support to multiple client roles (e.g. around the clock/around the world to students, faculty, LMS administrators, etc.)?

Client References

In this section (maximum 5 pages), provide the following:

A. Submit five (5) Client References that provide former clients and representative projects undertaken in the last five (5) years which demonstrate experience relevant to this RFP, including minimum qualifications.

B. For each project, provide a project description, project costs, dates of engagement, project owner, and member(s) of the proposed team for this RFP that participated in the project, including any sub-consultants that worked on the project.

C. For each reference, provide the name of the agency/firm, the contact person's name, title, address, phone number, and email address. Please ensure that the contact information is accurate for each reference.

Budget

Rate Sheet shall be submitted separately from the RFP response, see attached Attachment E - Rate Sheet.