



METROLISTSM

Request for Proposal (RFP) To Provide a Learning Management System

Draft

October 1, 2006

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Introduction

Metrolist Incorporated (Metrolist) would like to evaluate Learning Management System (LMS) providers who have the resources and capabilities that meet or exceed the needs and requirements detailed in this RFP. Formal proposals are now requested from software vendors who wish to engage in a contractual relationship with Metrolist for the purpose of providing a Learning Management System.

Metrolist Inc. (Metrolist) is a Multiple Listing Service (MLS), serving the greater Denver-Metro area. Founded in 1984, Metrolist is guided by its mission to keep the real estate professional central to the transaction by providing extensive listing inventory and a framework for cooperative compensation; ultimately providing an efficient marketplace to benefit the buying and selling public. Metrolist currently serves approximately 17,000 members and has 65 employees.

Metrolist strives to be an entrepreneurial, leading edge organization and is a unique MLS. Two ways Metrolist is different from most MLSs:

- Metrolist owns and operates its own core MLS system and has for nearly 20 years. It performs the development, support, and training in-house using Metrolist staff.
- Metrolist charges its members on a time-usage basis, termed “timeshare” by the company. The more time users spend on the system, the more they pay.

Questions and comments regarding this document should be directed to:

Geoff Humphrey
Training and Education Manager
Metrolist, Inc.
ghumphrey@metrolist.com
303-850-9576

System Overview

Metrolist desires to implement a fully featured, Internet-based LMS. Such a system would include, at minimum, these primary components:

- An instructor led training (ILT) feature set to facilitate self-service enrollment and track attendance;
- The ability to launch and track custom eLearning content;
- The ability to issue, store and track certifications;
- SCORM or AICC compliance;
- The ability to track individual learner training activities;
- A reporting interface with the ability to view and export reports in differing formats;
- Import of user information.

There will be an opportunity to describe this functionality in various portions of this document.

Additional features and qualities that are optional, yet of interest to Metrolist, and will be judged are:

- Any “traditional” LCMS functionality included (e.g., course creation, test creation, etc.);
- Course evaluation and survey tools;
- Blended Learning support;
- Synchronous Learning support;
- Collaboration tools.

You will have the opportunity to give information on these additional items in section 6 of this document.

Vendors who are able to prove their system meets these requirements better than other systems will be considered first. Preference will be given to systems that exhibit a high degree of customization and configuration capabilities without the need for re-programming. In the “Pricing” section, please explicitly state the process, costs and lead times required to accommodate any customizations following the initial installation.

Terms of Proposal

In submitting your proposal, your company is implicitly agreeing to the following terms:

Conditions of Contract – Vendor will be required to financially guarantee minimum response times, and host system accessibility as measured by up time.

In order to guarantee continuous financial viability, Vendor will agree to share high-level information with Metrolist, detailing Vendor's financial viability, stability, assets, etc. Metrolist will keep this information confidential.

Use of Vendor Response in Contract – Any part or parts of the selected vendor's proposal may be used in, attached to, or referenced in the final contract. In addition, any correspondence between Metrolist and the selected vendor may be used in, attached to, or referenced in the final contract.

Confidentiality – This RFP, in its entirety, is considered confidential. The information contained within the RFP is for the exclusive use of Metrolist and the vendor who has received it. Any other use or distribution is prohibited without written authorization from Metrolist. Metrolist will only use the information in this proposal for the purposes of the selection process and will not distribute this information to any other parties without the express written consent of the proposing vendor.

Full Responsibility – The vendor agrees to act as the prime contractor for the delivery, implementation, and support of the entire system.

In-Field Testing – Tests may be requested of any proposed software as a means of confirming the vendor's claims regarding the capabilities of the proposed hardware and software.

Acceptance Period – An acceptance period will be defined to evaluate the completion of the hardware and software installation. Certain financial holdbacks can be applied during this period. Escrow arrangements acceptable to Metrolist and the vendor can be considered.

Proposal Response Guidelines

Your proposal is due on or before 5:00 PM MST on October 31, 2006. This RFP has been sent to you as a Microsoft Word document so that we can capture responses in a consistent format:

- Please insert your answers and information within the document.
- The RFP format must be followed.
- If you choose to convert the document to another format (e.g., PDF) once completed, please send an additional copy of the feature/function grid separately, in Microsoft Word or Excel format.

In addition to the information required in the RFP form, please feel free to send any other information and materials (e.g., marketing materials, white papers, brochures, CDs, etc.) you feel will be helpful in supporting a better understanding of your product.

Please make sure your proposal is organized and includes page numbers and/or tabs and a table of contents.

If you have difficulty with, or questions about, the format of the RFP, please contact Geoff Humphrey at 303-850-9576 or ghumphrey@metrolist.com. Geoff will be your primary contact regarding this RFP.

We highly encourage dialogue throughout the process. Our goal is to give you the information you need to put together a great proposal that targets Metrolist's needs, while ensuring Metrolist learns as much as possible about your product.

Other Items of Note:

- Please read the pricing section carefully. Do not hesitate to ask questions prior to submitting your proposal.
- Prospective vendors may be asked to provide an online demonstration, at a mutually convenient time.
- Upon request, prospective vendors should provide a test account that may be used by the Metrolist LMS selection team.
- All finalists should expect to attend a meeting at the Metrolist office to personally present information about their product and company. This will be an opportunity to explain, in person, why your company should be chosen as the LMS business partner and answer remaining specific questions.
- Other interactive informational sessions may be requested.
- Any responses in your proposal that do not fully meet *all* terms of the RFP must be clearly stated in the Exclusions section.

Proposal Delivery

Proposals must be received no later than 5:00 PM MST on April 14, 2007. No extensions will be granted.

Please furnish one (1) bound paper copy *and* one (1) electronic copy in either Adobe Acrobat PDF (with no copy security) or Microsoft Word format to the recipient below.

Geoff Humphrey

Training and Education Manager

Metrolist, Inc.

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Greenwood Village, CO 80111

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Proposal Structure

The proposal is intended to capture a wide range of information about your company and product. The components of the proposal requested are listed below:

1. **Company and Product Summary Information** – This section is intended to capture general information on the company size, time in business, marquee clients, current usage, upcoming releases and features, etc.
2. **Pricing** – This section will contain the pricing for your product and related services. You may attach more detail as an appendix, as described in the instructions, as necessary.
3. **Hardware and Operating Environment** – Information on the infrastructure and physical environment
4. **Software Feature and Function Grid** – This is an in depth look at your product. This grid does not attempt to capture every possible feature of the LMS, but should capture the most essential features of a complete and robust LMS product.
5. **Feature Descriptions** – There are a few grid items that cannot be answered in a yes, no or one word answer. In this section you'll answer applicable questions and have space to expand, where appropriate.
6. **Additional Application Questions** – We've added a few questions whose answers are likely more expansive than the grid format will allow.
7. **Additional Features** – If there are things we did not ask about that you think make your system unique let us know.
8. **Product Roadmap** – Please let us know where you are going with your product so we have information on your *planned* roadmap.
9. **Why Metrolist Should Choose Your Product** – This is your chance to sell and differentiate your product in your own words, using not only this form, but your own material as well.
10. **Outsourcing** – Please provide information on outsourced/purchased solution such as technology components of your application, contractor outsourcing for support or primary development efforts, etc.
11. **Implementation Summary** – Please give a high-level description of the implementation process including primary steps or phases, approximate timelines, vendor resources and required Metrolist resources necessary to launch the LMS.
12. **Exclusions** – Exclusions or concerns relating to the content of your proposal, especially as it relates to the RFP.
13. **Sample Agreements** – Any boilerplate agreements you would use in the event Metrolist selects your company to supply the LMS.
14. **References** – A list of at least three references.

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1. Company and Product Summary Information

- a. **Company Name**
- b. **Company Established**
- c. **Summary of Products and Services**
- d. **Key Personnel Background/Bios**
- e. **Customers and Users** – Number of end users for each account. Please differentiate accounts using version release proposed for use in this RFP and any past version(s) in use.
- f. **Hallmark Accounts** – Any particularly relevant accounts you would like to bring to our attention.
- g. **Company Stability** – Include any facts you would like that illustrate your company’s stability and potential longevity. This section may include relevant corporate activities such as mergers or acquisitions, profitability (may be in generalized terms), largest corporate risks, future corporate activities, financial projections, etc.
- h. **Original Product Release Date**
- i. **Original Product Name** – Please also list any other LMS products/companies you have acquired.
- j. **Current Release Version**
- k. **Current Version Release Date**
- l. **Next Expected Release**

2. Pricing

Preference will be given to vendors who demonstrate the willingness and ability to support Metrolist’s goals and philosophies. Other than the restriction stated in the first bullet below, Metrolist will consider a variety of pricing models. You are welcome to offer multiple pricing model options if you wish. As you develop your proposal please consider all of the following:

- **Metrolist will not consider enterprise or “all-in” pricing based on per user, per month for *all* MLS members. Whereas all members use its core MLS system, not all will use the LMS.**
- Metrolist will pay a fair monthly or yearly fee and will consider a flat monthly or yearly fee, a per transaction fee, a tiered pricing structure, a ramped monthly fee or any other model that is proposed other than that listed in the previous bullet item.
- Metrolist sees itself as a distributor of your product. We will consider purchasing the ASP application from you and provide the product to our membership.
- Metrolist will also consider a hosted solution providing that the transition to the end user is seamless.
- Metrolist expects to significantly support the marketing, distribution, end user set-up, end user training and end user support. Metrolist is interested in seeing proposals that include options that offer flexibility (e.g., level 1 & 2 support or only level 2 support; training of all end users vs. train the trainers).
- Co-marketing arrangements will be considered, provided financial incentives are included.

Again, dialogue on proposed pricing models is highly encouraged.

Pricing detail should address, at minimum, the following items:

- a. The total *initial* and *monthly/yearly* full service fees, along with all associated fees.
- b. Costs to maintain host system hardware and software (ASP solution) vs. cost for Metrolist to employ an installed solution.
- c. Set-up fees, including integration costs. *Integration details should be covered in section 6.*
- d. Per user fee, if applicable. Additionally, provide your definition of an “active” user (e.g., does the user have to be completely erased to become “inactive” or can their information still be stored while being “inactive”).
- e. Costs for support services provided for staff and end users, including additional costs if any.
- f. Upgrade and enhancement plans, maintenance policies, and costs over the contract term.
- g. Additional data content that you may be including in the proposed system.
- h. It is anticipated that Metrolist may choose to run a “beta-test” or soft launch period of 30-90 days with a limited number of users. This would happen prior to offering the systems to all members. Please provide a price for this limited use period. This period is not a test period for selection purposes; it will be post contract and will commence after initial system set-up and deployment.
- i. Financial penalties will be negotiated for non-performance of the Learning Management System. If you have certain terms you wish to propose, please include them in this section.
- j. Other costs. Include any additional costs for services or fees, including additional options and/or configurations not included in the proposal summary.

3. Hardware and Operating Environment

- a. Summary of proposed operating system environment and technology platform (OS version, database platform, development language(s), etc).
- b. For your hosted solution, provide a detailed description of your disaster recovery plan. Please include backup policies and procedures, including time to estimated recovery from types of system failure.
- c. Specify network communications hardware and bandwidth provisions for an installed solution.
- d. Indicate how the proposed solution may be scaled to provide for larger capacities.
- e. For your hosted solution, indicate the specific hardware, software, and processes used to protect the system against illegal use (e.g., hacking). Please include the date of, and a summary of, the results of your most recent security audit.

4. Software Feature and Function Grid

Please indicate “Yes” or “No” in the right-hand column to indicate whether your software **currently** has the following features. Metrolist may verify features during the selection process. You will be expected to deliver features that you indicate “Yes” to below.

Feel free to make *brief* notes if you wish, indicating any 3rd party components or pertinent partners. If necessary, please attach additional sheets with other features that reference this section, but these should be functional capabilities and content only - *not* marketing messages such as “provides value to consumer,” etc.

Please note that the following list is not necessarily exhaustive and represents features that are both “essential” and “optional” to Metrolist. **Essential** items are marked with an asterisk (*).

A	Interface and Learner Functions	YES/NO
1	Web-based learner interface*	
2	Web-based administration interface*	
3	Web-based data entry*	
4	Ability for learners to print progress reports and transcripts*	
5	Ability for administrators to sign up any learner for any course*	
6	Able to display custom branding (is it “skinnable?”)*	
7	Ability to sign up for any course online*	
8	Ability to bookmark a course and return later	
9	Ability for learners to search for training courses by keyword	
B	Classroom Management	YES/NO
1	Ability to set up new classes using templates*	
2	Ability to create multiple sessions of a class without typing common info multiple times*	
3	Ability to limit class size*	
4	Automatic wait list feature*	
5	Ability to limit wait list size*	
6	Ability to update class status (cancellations, change in date/time, etc.)*	
7	Ability manage rosters*	
8	Ability to output class rosters in report form*	
9	Ability to output monthly course schedules	
10	Ability to confirm class reservation via email*	
11	Ability to email reminders to class participants at a custom time interval*	
12	Ability to confirm enrollment immediately*	
13	Ability to schedule multiple sessions of the same course*	
14	Ability to schedule courses on non-contiguous days*	
15	Ability to track student attendance and non-attendance*	
16	Ability to assign a status to students (e.g., “no show,” “cancelled,” etc.)*	

C	Content, Curriculum and Certification Management	YES/NO
1	Ability to set course prerequisites*	
2	Ability to create a training plan for individuals	
3	Ability to create a training plan for a group	
4	Ability to automatically issue course completion certificates*	
5	Ability to automatically track course completion certificates*	
6	Ability to automatically store course completion certificates*	
7	Ability to manage course evaluations	
8	Ability to manage instructor evaluations	
9	Ability to display an online catalog*	
10	Ability to track course completion status*	
11	Ability to require classroom courses	
12	Ability to require online/eLearning courses	
13	Ability to require assessments*	
14	Ability to support blended learning initiatives	
15	Ability to launch eLearning content*	
16	Interoperability with 3 rd party courseware vendors (please indicate which vendors in the Feature Descriptions section)	
17	Ability to run web-based courses developed internally with Dreamweaver, Flash, Captivate, PowerPoint*	
18	SCORM Compliance (please indicate version)*	
19	AICC Compliance (please indicate version)	
20	Ability to set passing scores for tests*	
21	Ability to automatically grade tests*	
22	Built in test creation engine	
23	Built in survey creation engine	
24	Built in content authoring	
D	Reporting	YES/NO
1	Web-based reporting interface*	
2	Ability to report on learner progress by individual*	
3	Ability to report on learner progress by group	
4	Reports formats: HTML, .pdf, .csv, .doc, .xls*	
5	Ability for administrator/privileged users to generate enrollment/registration reports*	
6	Ability for administrator/privileged users to generate graphical reports	
7	Ability for administrator/privileged users to generate custom or ad hoc reports	
8	Ability for learners to access their own progress reports/transcripts*	
9	System includes report templates (please indicate in the Feature Descriptions section below)*	
10	Export to Excel*	

E	Tracking	YES/NO
1	Ability to track learner progress in eLearning courses*	
2	Ability to track learner assignments	
3	Ability to track learner attendance*	
4	Ability to track by course*	
5	Ability to track by learner/student*	
6	Ability to track by department	
7	Ability to track by organization or entity	
8	Ability to track overall learner training history*	
F	Learner Functions	YES/NO
1	Ability to bookmark a course and return later*	
2	All entries are time stamped	
G	Security	YES/NO
1	Each user has unique username and password	
2	Sensitive data is encrypted in database	
3	Integrated with 3rd parties in a secure manner (if yes, please describe in Feature Descriptions Section)	
4	Software has been audited by 3rd party firm for security	
5	Ability to specify multiple levels of security and number of levels	
H	Customization	YES/NO
1	Branding can be set by top level admin	
2	Ability to customize certificates*	
3	Ability to customize confirmation and reminder emails*	
I	Configuration	YES/NO
1	Ability to import user/member lists*	
J	Service Levels	YES/NO
1	Do you offer a Service Level Agreement (SLA)?	
2	Does your SLA include an uptime percentage agreement?	
3	What is your guaranteed uptime percentage?	
4	Does your SLA include a maximum "maintenance window" timeframe (not included in the uptime percentage)? (If yes, please describe in Feature Descriptions Section of Proposal)	

5. Feature Descriptions

This section allows for more narrative and descriptive text for certain items contained in the grid above. Please complete the items below, if appropriate, for your product. The numbers below match the feature/item number on the Feature and Function Grid above.

C 16

D 9

G 3

J 4

6. Additional Application Questions

- a. Please list any applications or eLearning content providers with which your LMS application is currently integrated and briefly describe the nature of the integration.
- b. With what standards does your LMS currently interface/meet?
- c. Please describe the nature of LMS integration types you have performed.
- d. Summary of performance guarantees (Feature and Function Grid also includes SLA specific questions). Standard SLA should be attached as appendix, if available.
- e. Has your system undergone any standardized, third party usability testing? If so, please describe. If not, please describe what steps your organization has taken to ensure a high standard of usability.

7. Additional Features

Please use this section to list and describe any system feature you feel is important that not captured in the sections above. Metrolist may verify features during the selection process. You will be expected to deliver all features that you describe below.

8. Product Roadmap

Please tell us about your product roadmap. What new features will you be adding and when? Please only list items for which you have a planned and scheduled release date. Please include the planned release date for each feature you list.

9. Why Metrolist Should Choose Your Product

In your own style and choice of media, concisely tell us what your unique competitive advantages are and what is compelling about your business proposition. Include this as an addendum or attachment. Use this space to direct reader to the content you have included in answer to this item.

This is an opportunity to identify points of differentiation and direct Metrolist to pay special attention to areas in which you feel you have a competitive advantage.

10. Outsourcing

Solutions that incorporate products or activities that are contracted or outsourced must be fully described to include all relevant information (e.g., contractor name, the nature of the contractor and vendor relationship, etc).

11. Implementation Summary

Please give a high-level description of the implementation process including primary steps or phases, approximate timelines, vendor resources and required Metrolist resources necessary to launch the LMS.

12. Exclusions

Detail any concerns or exclusions you may have, regarding the requirements of this RFP.

13. Sample Agreements

Please include copies of your standard hardware, software, and maintenance agreements. Include any other pertinent documents.

14. References

At minimum, please provide three customer references with contact information. Please identify whether these customers are using the same software version or configuration used to complete the Feature and Function Grid.

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