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City of
Philadelphia

Office of the Chief Administrative Officer
HR & Talent

REQUEST FOR INFORMATION
Citywide Learning Management System

This RFI has been recently updated as April 10, 2020 to include the new timetable in response to the delays from COVID19.

Changes occur on pages 3 and 4 only.

March 20, 2020

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1. Summary of Key RFI Dates

RFI Posted	March 4, 2020
Questions regarding RFI due	March 11, 2020
Responses Provided	April 22. 2020
RFI Submission date	May 4, 2020

2. Purpose of the RFI

The Office of the Chief Administrative Officer's HR & Talent Division is issuing this request for information to determine if there are companies in the marketplace that can provide a Learning Management System that is capable transferring from existing learning management system and integrating with other City systems.

This RFI is not a solicitation for procurement. It is intended to inform a Request for Proposal (RFP) for a citywide Learning Management System. Information learned from this RFI will be used to help develop the Statement of Work for that RFP.

3. Background and Context

Human Resources & Talent (HR&T) was started in 2016 to support the continued development of a talented and diverse City workforce by utilizing modern and transformational talent management strategies. HR & Talent reports to the Chief Administrative Office who is responsible for modernizing City government and improving the efficiency and effectiveness of City services.

The City has a workforce of about 30,000 employees and through the learning management system, several compliance trainings (e-learning and instructor led), as well as other learning and development courses are assigned, administered, tracked and reported.

The overall solution is to have a user-friendly learning management system that will integrate well with existing City systems, including HRIS Systems, and provide a seamless transfer all content including and historic records from current learning management system, as needed.

4. CONDITIONS GOVERNING THE RFI

A. SEQUENCE OF EVENTS

1. **RFI Issued:** This RFI is being issued on **FEBRUARY 27, 2020** by HR & Talent

2. **RFI Questions:** All questions about the RFI must be submitted by email to Tracey Bryant at tracey.bryant@phila.gov no later than 5:00PM Eastern Time on **MARCH 6, 2020**.

3. **Answers to RFI Questions:** All RFI questions will be catalogued, answered, and published to all known prospective respondents 10 days before the RFI deadline on was changed to **APRIL 22, 2020**.

4. **RFI Response Deadline:** The deadline for receipt of responses was changed to **MAY 4, 2020,** no later than 5:00 PM Eastern Time. Responses received after the due date and time will not be included in the RFI review.

5. **RFI Response Submission:** All responses must be submitted electronically to Tracey Bryant at tracey.bryant@phila.gov . All responses must be labeled in email Subject line: "Response to RFI – Learning Management System"

5. Current Systems

The City currently has a learning management system that integrates with One Philly, the City's payroll and HRIS system. These systems need to be integrated to upload employee data that enables courses registration, assignment and tracking of training. Monthly integrations take place to upload new employee data.

6. Requirements and Specifications

B. SCOPE

This RFI is a preparatory step to inform HR and Talent's understanding of current learning management cloud solutions and the costs associated with the setup, host, transfer of training data from one LMS to another, implementation, and maintenance services that meet or exceed HR & Talent's requirements.

THIS IS NOT A BID.

HR & Talent manages the City's current LMS. This LMS lists and or houses almost 1,000 courses (about 30% are e-learning courses). The system is a critical source for compliance training that is often in an e-learning format such as Sexual Harassment prevention, Cyber Awareness training, and so on.

Individual departments have designated LMS administrators with permission to view, assign, track, or upload training solely for their department or specific employees.

The LMS system is integrated with One Philly / Oracle. One Philly / Oracle is the City's payroll and HRIS system that feeds employee data (for example: name, supervisor, job title, employee identification numbers) into the LMS. This is how the LMS stays up to date on the new employees entering the workforce. This process currently involves the IT group sending the LMS vendor a large employee data file to input into the LMS system. This is critical to keeping accurate records in the LMS.

Often employees request password resets and the current system resolves this manually. As a result, the desired system must be capable of integrating with current City systems (One Philly / Oracle), migrating LMS content from current system into the new LMS system, and provide automated troubleshooting options for password resets.

7. Functionality Assessment

Respondents must describe or provide a reference to the accompanying functional user requirements (next page) describing how the proposed LMS solution meets each of the line items. Please use the question numbers as cross-references to your response.

To help purchasers best understand the features that are currently available and to what extent they are configurable, please use this guide below in conjunction with the Functionality Table.

- Please indicate whether the proposed LMS solution has this functionality *currently available, not available, or planned* (indicate anticipated delivery date). Do this by indicating a **"YES"** for Currently Available, or a **"NO"** for Not Available,
- Use the comment field to address whether the item is planned or to elaborate further.

- Please describe which components and or features / functions are configurable, customizable, developable, or depending on external resources. Again, use the comment field to address this item.

(See next page for the Functionality table)

Functionality Table

Functional user requirements needed for the City of Philadelphia LMS	Yes	No	Your Comments or Questions
PART A- BASICS			
1. Must support 33,000 + users			
a. Manually add additional users (contract, volunteers, etc.)			
b. Add additional licenses if needed			
2. Accessible through:			
a. Computer/Laptop			
b. Notebook			
c. Mobile device			
d. App for Android & iPhone			
e. Outside of work			
f. Browsers (Chrome/Explorer/Firefox) without compromising quality			
3. Ability to integrate employee data with other systems including Oracle			
a. Automated integration			
4. Ability to import/export Microsoft Office material, ASII and other applications			
a. Integrate session dates with Outlook calendar (scheduling / email)			
5. Course authoring tool			
6. Able to access City's firewall			
7. SCORM compliant LMS platform			
8. SCORM translator			
9. Ability to filter and restrict content restrictions to be out in place for sensitive content (e.g., restrict by job function, location, dept)			
10. Importing historical training data			
11. Ability to use Application Program Interfaces (API) from other systems to access, retrieve and integrate data for storage and analysis?			
12. Native API to stream or provide data from the LMS to other systems			

13. Ability to modify/brand user interface for City of Philadelphia			
14. Ability to toggle between role types while using the same license (e.g. administrator and user or manager and user)			
15. Ability to support other common file formats (streaming media, graphics, audio, animations, online videos, etc.)			
16. Ability to support multiple concurrent connections (Min 5000 users)			
17. Mechanism to ensure that learner has completed training session through to the end and provide test results, with the ability to produce custom reports and metrics			
18. Ability for administrators to build an organizational hierarchy			
19. Ability to apply logic to system to group users in one or more group based upon specific fields during integration			
20. Able to perform integrations with payroll weekly			
a. Automate integrations			
b. Ability to produce reports on status and results of successful integration			
21. ADA Section 508 compliant system			
22. Fully integrated webcasting and virtual meeting capabilities			
23. RSS feed			
24. Ability to trigger email notifications to learners' supervisor or manager for actions such as enrollments, changes.			
PART B - USERS			
1. An automated forgotten password/change password			
2. Ability to customize user profile fields			
3. View available courses, courses assigned, and courses completed.			
4. Transcripts generated and printable			
5. Ability to deactivate users but still report on their activity			
PART C -OTHER			
1. Ability to add, update, reschedule, and remove courses quickly by course manager or administrator			
2. Ability to add venues and assign them to sessions			
3. Ability for user to earmark a module and go back to it			

4. Can inactive courses be automatically archived and removed from user menu?			
5. Ability to manage certifications			
a. Ability to track certification deadlines			
b. Ability to designate expiration dates for certifications			
c. Ability to manually grant certifications			
d. Ability to track external certifications			
6. Training certificates			
a. Learner can upload and print their own certificate			
b. Generate and send to all individual learners in one c. step			
7. Ability for administrators to manage waitlists			
a. Automatic notification to course manager or admin of learners on waitlist			
8.. Ability for instructor to generate class roster / sign in sheet			
8. Customized notification (enrollment message, class reminders) for class			
10. Ability to set the maximum number of people to enroll			
11. Ability to set due dates			
12. Knowledge base - ability to store job aids, policies, training materials			
13. Ability for administrators to create, change and view user information/profile			
14. Ability of administrators to create custom fields in user profiles without intervention from vendor?			
15. Communications abilities (to individual user, to group)			
a. Automatic training reminders			
b. Customize emails/automatic reminders			
16. Can administrator designate/change user's supervisor?			
17. Can instructor enroll users in course and does the LMS allow the instructor to post links, webinars and other learning aids?			
18.. Personalize learning plan with ability to update/adjust/create learning plan			
a. Individual			
b. Group			
PART D			

1. Groups			
a. Detailed hierarchy and groups			
b. Users in multiple groups			
2. Permissions			
a. Ability to identify permissions on a detailed level			
b. Ability to customize permissions to be very specific			
3. Ability to track and generate reports, analytics and transcripts of completed training			
a) Generate report through a variety of parameters			
b) Learner, group, department			
c) Course, session(s), multiple courses, dates			
d) Completion, passed, did not attend			
e) Learners registered for upcoming courses			
4. Track and generate reports on certifications, learning plans and mandatory training			
a. By expiration or due date			
b. By learner that have NOT taken a course (Important)			
5. Ability to configure dashboards to show various types of reports (e.g., graphs, charts, standard reports)?			
6. Ability to establish scheduled report			
a. Automatically sent via email to an identified user/admin			
b. Report on and track learners that have NOT completed training			
7. Ability to customize metrics & KPIs			
8. Ability to configure dashboards to show metrics (graphs, charts, tables)			
a. Printable			
PART E - Testing			
1. Sandbox			
2. Assistance to content providers to test compliance with the LMS?			
3. What type of support will your team provide the City with any IT issues?			
a. During initial implementation			

b. Administrator / Owner			
c. Help desk support throughout the use of the vendor's products			
4. Will your team be available to assist with any IT issues during the initial implementation of the LMS?			
a. Assistance			
b. Administrator/Owner			
c. Customizable task specific printable instructions for users and admins (login, registering, generating report etc.)			

9. HOW TO RESPOND:

The respondent's submission to this RFI must be organized in the following format:

1. Executive Summary – Your summary should include the following:
   - What uniquely qualifies you in this space;
   - What you see as the critical success factors to this project
   - Number of years you company has been in business
   - Where your business is headquartered
   - Whether your company is a certified Minority, Woman, or Disabled-owned business
   - Staffing size and structure
   - Name/s, title/s and contact information of persons to be contacted for clarification.

2. Response to Functionality Assessment (section 7)

3. Describe Technical Specifications: Describe and illustrate the preferred system architecture and deployment model as well as alternatives supported (please include hosting models, server architecture (virtual/physical), database, platforms, operating systems with version numbers, etc.)

4. Provide a pricing model as follows:
   - line item/categorical and TOTAL COST for 3 YEARS for full setup, migration of current LMS content, testing, planning, training, deployment, integration with City systems and ongoing help desk support
   - What is the pricing / licensing model for implementation and maintenance support of the LMS (number of users, concurrent users, per PC)
   - Within the system, are there any third-party costs associated with a specific functionality? Example: integration, reporting? If so, please describe where these costs are associated, and for what functions.

5. Respondent's General Terms and Conditions for business engagements

6. Other Supporting Materials/Documentation Respondents may attach other materials that they believe may improve the quality of their responses. However, these should be included as items in a separate appendix. Note: Submissions of marketing materials only will not be considered.

HR and Talent recognizes the time and effort required to respond to this RFI.
Thank you for your interest in this critical project.

City of Philadelphia Responses to RFI
Citywide Learning Management System
Wednesday April 22, 2020

A total of 50 questions were received. Responses are below.

Q1: What is the City of Philadelphia's ecosystem beyond One Philly / Oracle where integration would be desired?
A: The complete ecosystem at the time of this response includes only One Philly / Oracle. These systems house all of the City's workforce data and HRIS.

Q2: What is the City of Philadelphia's current LMS?
A: SmarterU

Q3: What is the City of Philadelphia's typical content types for online learning?
A: Content varies for online learning. It can range from mandatory sexual harassment training or other compliance training, to soft skills and personal and professional development.

Q4: Is there an initiative to scale beyond compliance training? (E.g. Leadership, Professional Development)
A: Yes. The City currently uses the LMS to house both compliance training, professional development and is aiming to including more leadership.

Q5: Is the City of Philadelphia's initiative to grow online learning beyond the current blending of 30%?
A: Yes. An increase is planned. The percentage amount cannot be determined at this time.

Q6: What is the expected turnaround time from RFI review to RFP launch?
A: At this time, the City is collecting information. The turnaround time cannot be determined. Typical projects like this generally are a minimum of 6 months to a year, including implementation and Go live.

Q7: What is the expected "Go Live" date for a new LMS?
See response to Q6.

Q8: With regard to transfer of "historical data" (Part A, #10 Functionality Assessment Table), what is the scope of data (detail, timeframes, etc.) needed to be transferred to the new LMS?
A: The City needs to be able to report training completed, specifically for compliance training and other training. As a result, a migration of the current LMS content would be needed, for example: training course, training content (SCORM files, online courses, course descriptions), training enrollment and completion data of employees (John Doe course completion and course registration history).

Q9: How are employees enrolled in online and ILT? Registration, self-enrollments or administrator-assigned?

A: Currently there are four options for enrolling and they are: manual, self-enroll, auto-enroll, or assigned enrollments

Q10: Is there a priority scope to the technical requirements listed in the Functionality Assessment Table?
A: The listing in the Functionality table, can be a guide for priority as it listed beginning with "Basics" to "Users" and so on.

Q11: Can you provide examples of what constitutes a "custom field" (Part C, #14 Functionality Assessment Table)?
A: This function would allow the City LMS admins to customize user profile fields. For example, if the user profile has fields for name, employee ID, job title. The City admin could add more fields, such as Committee, Civil Service, Full Time/ Temporary / Contractor and so on.

Q12: What is the logistics around the integration into Payroll?
A: Currently our Information Technology group sends an excel file to the LMS provider. This contains the workforce data for all current employees. See Q22 for more details.

Q13: Does the City of Philadelphia currently leverage any BI Tools or Data Warehouse?
A: Not at this time.

Q14: What is the desired support model for the City of Philadelphia (admin, end user)?
A: For admin support: technical helpdesk support available by phone, email, and or web chat on weekdays and as needed, preferably email correspondence on the weekends.
For end user support: Current model equips the internal admin to provide end-user support. This is still ideal, however, an end-user web chat function would also be helpful for end-users.

<div align="right">**Questions submitted from Deltek**</div>

Q15: Is there funding approved for this? If yes, through what means?
A: Yes. Annual funding is approved for the citywide LMS. The funding will come out a budget in partnership with the Office of Information Technology

Q16: How might we attain copies of the current vendor's contract if there is a current vendor performing this service?
A: The City of Philadelphia has adopted an Open Records policy to comply with the Commonwealth's Act 3 of 2008, 65 P.S. §§ 67.101 et seq., commonly known as the Right-to-Know Law. With certain exceptions, members of the public have the right to inspect and/or copy public records upon written request.

Please note that due to the Declaration of Emergency Related to the Known and Potential Presence of the Novel Coronavirus COVID-19 in Philadelphia, requests submitted under the Open Records Policy are subject to delay.

You can view the City's policy, procedure, and get more information on the COVID-19 processing delay at this link.

Q17: If this RFI does greenlight a solicitation, what is the estimated timeline or target for procurement?
A: See response to Q6

Questions submitted from Accord LMS

Q18: Regarding "Part A.6 : Able to access City's firewall" - Can you provide a more detailed explanation of what you're looking for here? I believe that we'll need some context to be able to address this item.
A: There are no special requirements. Any firewall rules need to go through an approval process. The vendor would need to go through an approval process and be granted that access.

Questions from Cornerstone | eSkillz

Q19: Do you have any users whose data will not come from your Oracle HRIS? If so, how will their accounts be created in the system?
A: Yes. Contract workers and similar employees will not have employee ID numbers and are not in the Oracle HRIS. Currently accounts are manually created for them. A fake employee ID is created as well.

Q20: How frequently would you like to update user data in the LMS (nightly batch process or real-time web services)?
A: Real time is most ideal, but currently there are weekly to bi-weekly updates.

Q21: What systems besides your Oracle HRIS will you need to integrate with the LMS?
A: Oracle, OnePhilly are the only systems.

Q22: What are the requirements for each integration (data fields, into LMS or bi-directional, frequency)?
A: The data fields are listed below. The feed is into LMS (not bi-directional). This is done weekly.
Data fields: Employee Name, Employee ID, Position Name, Job Title, Department #, Department Name, Division, Location, Org ID, Hire Date, Employee Email, Alternate Email, Status, Assignment, Supervisor Name, Supervisor ID, Supervisor Email, Index Code, Home Group, Other Groups.

Q23: What are your requirements to integrate with your payroll system?
A: Currently the data integration is manual. This involves data from multiple sources, manually merged into a comma delimited excel file being sent to the LMS provider, to be integrated into the LMS.
To make it an automatic integration through to file delivery, we would need pull the data from a single source and establish an automated procedure for sFTP directly to the destination.

Q24: What is the system/technology provider used?
A: SEE ANSWER TO QUESTION Q2

Q25: What data elements will need to go into the LMS or be pulled from the LMS?

A: SEE ANSWER TO Q12

Q26: Please elaborate on the requirement "Ability to import/export Microsoft Office material, ASII and other applications."
A: The system should be able to house (import and store) in a knowledge base Microsoft office materials, and content developed in other applications. Additionally, users should be able to export this material from the LMS to their desired location.

An example would be where employees are accessing a knowledge base to export / import a job aid, the LMS would need to allow documents in this format to be uploaded. (Note – "ASII" should have been AICC)

Q27: Will you be loading the following types of learning objects? How many total learning objects do you plan to load to the new LMS?
   a. **Historic online courses (non-launchable)**
   b. **Active online/self-paced courses (Are they AICC or SCORM compliant?)**
   c. **Videos**
   d. **Documents**
   e. **Instructor-led events and associated sessions (ILT)**
   f. **vILT**
   g. **Tests/exams**
   h. **Evaluations**
   i. **Curricula**
A: We would be loading all of the above, but at the time of this RFI we do not have videos or vILT. The total number fluctuates often and below is a rough estimate. At the time of the RFI, there are at least 500 LMS items on the LMS (this number includes archived courses). Of the number, this includes over 20,000 records for historical data for compliance training (includes individual employee data that have completed training). At least 30 online self-paced courses, more than 100 instructor led events, and more than 100 tests / exams, evaluations, and curricula.

Q28: Are you looking to migrate any active/open or future ILT or vILT learner registrations into the new LMS? How many?

A: Yes. We would need to migrate all data, including active data from the LMS to the new LMS. (SEE ANSWER TO Q27)

Q29: From which systems would you like to load transcript/completion training data?

A: This question may need to be clarified. The City would need to migrate data from the existing LMS to the current LMS.

Q30: Approximately how many records to-date will each have?

A: This number cannot be determined at this time, but there are training records for over 500 courses. There are some compliance training courses that would be identified as high priority and there may be other courses that may not need to be included in the migration. See Q27

Q31: Please describe any outbound data feed requirements you have to export data from the new LMS into other external systems. Include the type of data (specific fields, if possible), destination system, frequency, etc.
A: See response to Q22 and Q23

Q32: Do you have any external content providers (LinkedIn Learning, Skillsoft, etc.) that you need to integrate with the new LMS? If so, which ones? Do you want completions for those external courses to be tracked in the new LMS?
A: There are more than a dozen Microsoft online learning courses that would need to be integrated into a new LMS. All data, including historical completion data would need to be tracked into the new LMS.

Q33: Would you like to integrate any vILT providers with the new LMS? Please specify which one(s). Ex. WebEx, GoToMeeting, Adobe Connect.
A: Yes. WebEx and GoToMeeting content

Q34: Will you require Single Sign On (SSO) to be implemented to allow users to log into the new LMS from your network without having to enter their credentials?
A: Preferably – yes.

Q35: Can you elaborate on your requirements as they relate to integrating RSS feeds into the LMS?
A: This is no longer a requirement.

Questions submitted by Envisage Technologies

Q36: Do the stated 33,000+ users include the City's police and fire department employees or do they have their own LMS? If so, how many police and fire employees are among these users?

A: Yes – this includes the police and fire departments. Police and Fire use the citywide LMS. Some departments (Airport, DHS) do have their own LMS, but the citywide compliance training will be housed on one central LMS.

Q37: Is 33,000 the number of users we should use for our pricing, which is based on the City's number of active users of the system?
A: Yes. 33,000 to 35,000

Q38: Would you like pricing based on any other levels of users?
A: Yes – max at 35,000 users to include an estimate for contract employees.

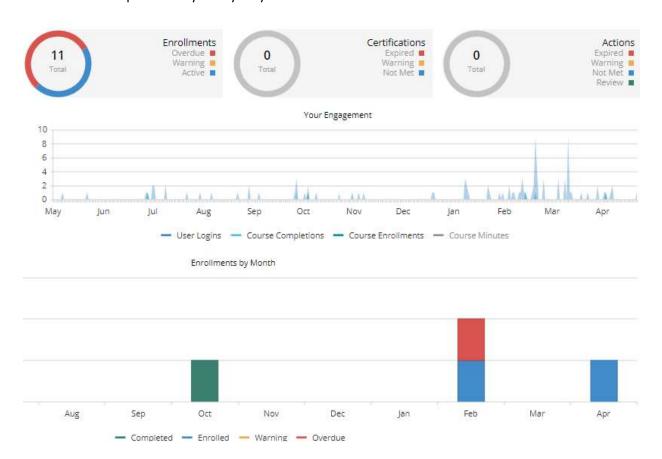**Q39: Do you have an anticipated budget for this project that you can share?**
A: Not at this time. Information received in the RFI process will help to inform a potential budget.

Q40: (Part A. 22) Regarding the fully integrated webcasting and virtual meeting capabilities requirement, can you please tell us more about how you would use these capabilities?

A: The City would like to host and store webinars of training sessions that would be in an mp4 format when storing. We would be using Webex, GoTo Meetings, or Microsoft Teams.

Q41: (Parts D. 5. & 8.) Regarding the requirements for ability to configure dashboards to show various types of reports and metrics, do you have any examples from a current system that you can show us?
A: Below is a sample. The style may vary:

Q42: A.4. Can you please clarify what is meant by ASII (could it be ASCII file format)?
A: Yes. ASCII is the correction. ASII was a typo.

Q43: A.8. By SCORM translator, do you mean converting files to SCORM format?
A: Yes.

Q44: If so, what source files would you request be converted?
A: Zip files of Power Point.

Q45: A.20 What would the desired integration be with the weekly payroll system?
A: Ideally, an API for access to the Oracle E-business system would either be available or custom created for direct access to the LMS.

Q46: Would this be in conjunction with, or replacing the Oracle integration?
A: This would be in conjunction with the Oracle integration.

Q47: A. 23 Can you please clarify what data would you be interested in syndicating through an RSS feed?
A: See response to question number Q35

Q48: C. 3 - By earmarking a course, do you mean a user being able to exit a course and then later resume it from the exited location? Please clarify.
A: Yes. Allowing a user to bookmark the course so that they do not have to start the training from the beginning.

Q49: C.6.A - Do you mean a learner being able to retrieve and print a certificate? Please clarify.
A: Yes. The learner should be able to easily print certificates after they have completed the course.

Q50: C.18 - Can you please clarify the type of workflows or use-cases which are represented by this item?
A: With personalized learning plans, the City would like for individuals to be able to create their own learning plan by selecting training from the catalog and tracking their completion. Additionally, groups (departments, committees, specific employee types) should be assigned training based on their employment category or other functions.