



County of San Mateo

Request for Proposals (RFP) for Request for Proposals (RFP) for Learning Management System (LMS)

Human Resources Department

RFP No. 2025-RFP-00371

RFP Contact: Brandon Himes
bhimes@smcgov.org

1. Introduction and Schedule

The County of San Mateo (the “County” or “SMC”) covers most of the San Francisco Peninsula. The region covers 744 mi and is home to nearly 800,000 residents and 20 incorporated cities. The County provides for the health and welfare of all people within its borders and serves as the local government for the unincorporated areas. Innovation thrives here in industries including bioscience, computer software, green technology, hospitality, financial management, health care, education and transportation. The County prides itself on how that prosperity fosters its commitment to protecting and enhancing the health, safety, welfare and natural resources of the community.

1.1. Summary

To support the professional growth of employees in their mission to enhance the lives of San Mateo County residents, the Human Resources Department (hereinafter “HR”) has been providing learning and development opportunities since the 1980s. Over the years, the program has expanded significantly, now offering a wide array of asynchronous, live in-person and virtual courses to approximately 7,000 County employees. Additionally, these learning opportunities are extended to employees from cities, special districts, and non-profits within the County. This Request for Proposal seeks to select a vendor who will provide and support a Learning Management System (hereinafter “LMS”) that will provide a County-wide System for managing, tracking, delivering, and reporting development and training opportunities to this diverse audience. This System must meet the requirements as listed in Section II: Scope of Work of this document.

1.2. Background

HR is issuing Request for Proposal (RFP) No. 2025-RFP-00371 for a LMS.

The contract awarded shall have an original term of five (5) years. In addition, the County shall have one (1) option to extend the term for an additional five (5) years, for a maximum term of ten (10) years, with all other terms remaining, including fees. These options may be exercised by the County in its sole, absolute discretion.

The County’s standard contract template has been included as **Appendix B** to this solicitation. The awarded contractor will be expected to sign an agreement prepared by the County using this template. Please ensure that your firm has completed legal review of these contract terms. If your firm wishes to request exceptions to these standard terms, submit a Contract Exceptions Request by the Deadline for Questions, Comments and Contract Exceptions listed in the Solicitation Schedule below. The County will consider Contract Exceptions Requests but reserves the right to reject requested modifications to its standard terms.

The results of this RFP may be used by governmental agencies, within twelve months of the conclusion of the competitive solicitation process.

1.3. Contact Information

Brandon Himes

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Department:

Human Resources Department

Department Head:

Rocio Kiryczun

Director

1.4. Timeline

RFP Released	January 27, 2025
Pre-Proposal Meeting (Non-Mandatory)	February 4, 2025, 1:00pm Agenda Online ZOOM - https://smcgov.zoom.us/j/88044081085
Deadline for Questions, Comments and Contract Exceptions	February 17, 2025, 5:00pm
Proposal Due Date and Time	March 3, 2025, 5:00pm
Interviews (tentative)	April 7, 2025 Online ZOOM
Product Demonstration (tentative)	April 28, 2025 Online ZOOM
Anticipated Contract Award Date	May 19, 2025

2. Scope of Work

2.1. Introduction

HR, Learning and Development Division, is soliciting proposals from companies who can provide a County-wide System for managing, tracking, delivering, and reporting training for County employees and non-County employees.

The LMS shall include the following components at minimum:

- A. Content Management
- B. Training Management and Certification
- C. Automated Notifications and Enrollment
- D. Multiple User Roles
- E. Reporting
- F. User Training
- G. Maintenance and Support Desk Services

Optional:

- H. Other System Related Functionality and Services

The Scope of Work (SOW) is to be used as a general guide and is not intended to be a complete list of all work necessary to complete the project.

Specifications:

- It is REQUIRED that proposers include all title-level specifications (e.g., A–G) as components of their proposed System, while allowing flexibility in how each broad required component is specifically addressed.
- Sub-title specifications (e.g., A1, B2, C1a, D5b, etc.) are NOT REQUIRED, but meeting more sub-title specifications will better align the proposed System with the County's ideal requirements.

The System is REQUIRED to be a multi-tenant software with periodic software updates.

The following System components describe the specifications of the ideal LMS.

A. Content Management

1. The System should have the ability to provide and host pre-built training/course libraries to promote asynchronous learning (e.g. TED Talks, online pre-built courses, etc.). Please list out examples of these offerings and your main external e-learning partners (e.g., LinkedIn Learning, Coursera, Udemy, etc.).

2. System should provide a centralized County-wide training repository – contains/organizes course catalog information, including curriculums, course descriptions and objectives, course types, and status.
3. Provide the ability to easily design and develop tailored curricula within the LMS, allowing for effective organization of learning paths, including the creation of detailed modules.
4. The System should provide an option to access content authoring tools, including but not limited to the ability to utilize templates to create custom courses, record separate trainings and upload them to the System for viewing; custom content creation and upload multiple file types outside of the need for third party software.
5. Ability to upload custom content courses, primarily through SCORM or AICC files. Support blended learning and ILT classrooms.
6. Ability to easily upload various external content formats (e.g., PowerPoints, PDFs, Word documents, and videos) and seamlessly associate them with specific courses and classes in the LMS.

B. Training Management and Certification

1. Ability for administrators and managers to easily create and manage online and in-person live training sessions.
2. Create sessions for specified events. Each session may consist of multiple parts, which may have their own separate location, equipment, and instructors. Also, should have the ability to select registration deadline, charge date, price, availability, and other options for sessions.
3. Set security at the class level, i.e. a class can be offered County-wide (for all employees and non-County employees) or can be offered at a department level only (i.e. only those in Dept X may register, or a class can be offered to a specific group (i.e. all employees with a specific classification title/code).
4. Accurate delegation features that reflect the management hierarchy in the County's HR system – Workday – for approving trainings when supervisors or managers are out of office, on leave, move into new roles, have left the organization, etc.
5. Allow learners to self-enroll in designated courses they are pre-approved for, while providing the option to restrict specific classes to require management approval prior to enrollment.
6. Editable fields to create custom IDs for newly created sessions and courses.
7. The System should provide the ability to easily manage and assign forms, exams, or any other pre-work before being officially registered in a course or training program.
8. The System should have the ability create knowledge checks, quizzes, and surveys within the System.
9. Manage and track CEU's (Continuing Education Units) and certifications and ability to gain CEU's and certifications when applicable.
10. Ability to self-certify - by completing certification trainings and printing out certificates, based on level of completion.
11. Automated and seamless certificate generation for all types of training (live and recorded). Also, the ability to generate customizable certificates.

12. System should provide the ability to easily input information on classes taken externally, including bulk uploads for large groups, and the ability to generate a report.
13. Provide an intuitive interface for team management that minimizes excessive drill-downs and offers easy access to class details and team training history for managers and supervisors of teams.
14. Design and administer post-training evaluations within the System to assess multiple aspects of training effectiveness.

C. Automated Notifications and Enrollment

1. The System should provide customizable email notifications, including but not limited to the following actions and criteria:
 - a. Learner registration
 - b. Withdrawal
 - c. Waitlist
 - d. Class reminders
 - e. Confirmations
 - f. Approvals
 - g. Cancellations
 - h. New course availability
 - i. Incomplete courses
 - j. When courses are required or due
 - k. Automated notifications for recurring training certification requirements (e.g., annual or biennial)
 - l. Flexible scheduling of reminders for incomplete trainings (e.g., at 30, 60, or 90 days), with an option to notify supervisors if training remains incomplete
2. Automatically enroll employees in trainings that need to be completed or refreshed at regular intervals.
3. Built-in waitlist feature for managing course enrollments.

D. Multiple User Roles

1. Multiple user roles with varying security access via SAML v2.
2. Ability to assign department administrators who have all the permissions and access of an administrator, but only for their department.
3. Ability to classify employees beyond just "active" or "inactive" and track those on leave or workers' compensation designations in Workday without removing training data.
4. Streamlined password reset and account management for external (i.e., non-county employees) users.
5. Administrators should have the ability to:
 - a. Create security levels and within each level, assign specific functions to that security level, and assign users to appropriate security levels.
 - b. Easily assign external trainings to multiple users.
 - c. Set up support information and define their fiscal year end date to facilitate reporting.

- d. Have a complete list of every user registered within Enterprise System, to be able to look up individual users or groups of users. It should also be possible to see which rights a user has and which users have certain rights.
 - e. Configure emails based on a number of pre-defined email triggers.
 - f. Assign courses to Learner(s) with deadlines and run reports on who the status of each course (i.e. pending, started, finished).
 - g. View all courses, assign user groups, track registration and attendance of all types (online, ILT). Support batch uploads of Learner(s) to courses and edit those lists, post-class.
 - h. Enroll groups of users into any training item. Administrators may also enroll users retroactively into past instructor-led events that were not entered into Enterprise System for some reason.
 - i. Easily add non-County users (over 1,500), such as contractors, interns and volunteers, to the LMS for training access.
 - j. Have flexibility in administrative permissions to allow for varying levels of access and responsibilities for specific roles within departments.
 - k. Have multiple viewing options to access and switch between different user perspectives to help with troubleshooting.
 - l. Easily share deep links for training registration.
 - m. Test System components in a dedicated test environment or beta version of the live site for evaluating updates and changes.
6. Learners should have the ability to:
- a. Search for, register, and take courses where they are eligible to participate. For example, an internal class is scheduled strictly for employees of the Department of Public Works, online registration for that specific class should only be accessible by the employees of Public Works.
 - b. View complete training histories.
 - c. Withdraw from classes they have signed up for.
7. Managers should have the ability to:
- a. View their subordinates' training records including required training, training progress and transcripts in their dashboards.
 - b. Establish required course(s) for their staff.
 - c. Develop a training or learning paths (collection of courses) for their staff.
 - d. Access training information on their divisions.

E. Reporting

- 1. The System should offer comprehensive reporting capabilities, including standard reports, ad hoc reports, customizable reports using a wide range of predefined and custom criteria, and automation of recurring reports. Custom report criteria and templates should be savable for future use and shareable with other System users and administrators.

2. The system should support democratized reporting access, allowing departments to independently create and run custom reports on-demand. If democratized access is not feasible, the system should include robust infrastructure enabling a central administrator to efficiently delegate or assign reporting capabilities.
3. Reports should be viewable on screen and downloadable on .pdf and .xlsx.
4. Reports should communicate traditional classroom-based metrics of attendance, withdrawal and cancellation, and request status.
5. Reports and searches should allow flexibility in viewing/printing active employees only or terminated employees only.
6. System should be able to track and manage including but not limited to the following criteria and data categories:
 - a. Unique Employee Identifier based on County Employee ID.
 - b. Ability to track non-County employees (e.g., contractors and the public) with the use of a unique identifier.
 - c. Rosters (Attendance or Roll Call) and Transcripts
 - d. Wait Lists
 - e. Enrollment – Batch, Individual
 - f. Instructors and their Biodata
 - g. Training Success Criteria – cost, time, retention
 - h. Course Details – online or instructor-led course information (e.g. # trainees, % completion, etc.)
 - i. Course Pre-requisites
 - j. Training Hours
 - k. Certification/CEUs and Expiration/Renewal Dates
 - l. Certification Hours
 - m. Mandatory Training
 - n. Org code
 - o. Job code
 - p. Class ID (ID based on actual class and date)
 - q. Employee Name
 - r. Custom (by division or program) certifications or custom course completion documentation
 - s. Attendance, No Shows, Incompletes
7. System should offer options to toggle reporting periods (fiscal year vs. regular year).
8. The ability for managers to run reports for their entire team, not just direct reports.
9. Provide the capability to monitor staff progress and track training completion efficiently, ensuring visibility into individual and team training status.

F. User Training

1. Create detailed user guides for all roles (administrators, managers, and learners).

2. Develop and deliver training specifically for System administrators, focusing on System setup, configuration, maintenance, and troubleshooting.
3. Provide training for departmental administrators to include course creation, audience assignment, reporting features, and management of localized learning needs.
4. Design and conduct end-user training sessions for learners covering System navigation, course enrollment, and tracking of learning progress.
5. Provide on-demand access to support materials and content, including but not limited to online training manuals and support FAQs.
6. Provide and develop training materials including but not limited to outlines, knowledge articles, process flows, video tutorials, and interactive e-learning modules. These materials should be updated as needed with each release.
7. Provide a comprehensive and easy to read dictionary explaining reporting fields, reporting criteria, and automated email triggers.
8. Facilitate role-specific workshops or training sessions to give staff hands-on experience with System functionalities before the go-live date.
9. Provide ongoing training support for a minimum of 90 days post-implementation, including refresher sessions and one-on-one support as needed.
10. Submit a training plan as part of the proposal, outlining methodologies, resources, timelines, and cost estimates for developing and delivering all user training requirements.

G. Maintenance and Support Desk Services

1. Access to help desk for technical support services.
2. Provide maintenance processes for the proposed System, outlining specific responsibilities for both the maintenance vendor and the County. Clearly distinguish between the tasks and duties assigned to each party.
3. Provide Service-Level Agreement (SLA) and process for getting vendor support.
4. Provide details on level of support (e.g., 24/7 live support via email, chat, and/or phone) and how System defects or issues will be addressed. Include response times, escalation procedures, and the availability of support during weekends or holidays.
5. Provide designated County staff with access to live support in event of emergencies.
6. The Vendor's System support team shall be fluent in the functionality and uses of both the LMS's features and associated applications and modules.
7. All updates, maintenance and deployment related activities shall be performed after County business hours (7:00am to 6:00pm) and after coordinating with County IT for approval, prior to the activity, vendor must provide expected downtimes. The County shall also be notified upon completion of these activities.

H. Other System Related Functionality and Services (Optional)

1. Ability to define the look and feel of System to fit the culture of the County.
2. Ability to seamlessly import data and information from completed PDF forms and Microsoft Word documents directly into the System.

3. Ability for a competency management feature within the LMS to facilitate the tracking and maintenance of employee competencies and qualifications and to offer suggested trainings for upskilling and career pathing to facilitate employee growth and long-term development.
4. Ability for AI functionality to enhance user experience and provide advanced functionalities like AI-enhanced assistance, course search, suggested trainings, skill based learning tied to jobs and career paths, and chat features.
5. Ability to support mobile learning with on-the-go access via iOS and Android devices.
6. Vendors may provide separate cost packages for optional features or services, such as advanced customization, additional training, or extended support.
7. Vendor may provide transferability/portability of all data, including but not limited to records, information, uploaded or County developed training materials after termination.
8. Vendors may provide separate line items in fee proposal for optional features or services, such as advanced customization, additional training, or extended support.

2.2. Performance Measures

The following performance measures will be used to evaluate the selected contractor's performance:

A. System Uptime and Reliability (e.g., 99% uptime per month).

1. **Measure:** LMS availability percentage.
2. **Accountability:** The LMS provider must maintain high System availability, with minimal unplanned outages or downtimes. Scheduled downtimes for maintenance should be communicated in advance and kept to a minimum.

B. Response Time for Technical Support

1. **Measure:** Average response time to support requests (e.g., within 1 hour for high-priority issues, within 24 hours for low-priority).
2. **Accountability:** The LMS provider must respond to technical support requests promptly, with clear communication and resolution timelines.

C. User Experience and Satisfaction

1. **Measure:** User satisfaction score from surveys (e.g., 85% or higher).
2. **Accountability:** Regular surveys should be conducted to gauge user satisfaction. Feedback should be actively collected and acted upon to enhance the user experience.

D. Data Security and Compliance

1. **Measure:** Number of security breaches (e.g., zero incidents per year) and compliance with relevant regulations (e.g., GDPR, FERPA).

2. **Accountability:** The LMS provider must ensure robust security measures to protect user data and comply with legal requirements. Regular security audits and updates should be conducted.

E. **Contractual Obligations**

1. **Measure:** Fulfillment of all contractual terms (e.g., 100% adherence to deliverables, and timelines).
2. **Accountability:** The LMS provider is expected to meet all contract terms, including deliverables and timelines.

2.3. **Technology and Security Requirements**

The System will need to accommodate the following technology and security components. The components shall include but are not limited to:

A. **Security**

1. Deploy firewalls and Intrusion Prevention System sensors.
2. Encrypt data in transit and at rest.
3. Vendor must provide appropriate background and fingerprint checks on employees accessing the System as well as demonstrate they have undergone training on the handling of sensitive/confidential data.
4. Have anti-virus and anti-malware software in place.
5. Product must be SAML 2.0 enabled to integrate with the County's Identity Management System.
6. Vendor must provide annual comprehensive audit including penetration testing to ensure security of the data and to identify, as well as fix infrastructure weaknesses and to ensure that the LMS is resilient against threats.
7. System must provide strong user authentication (passwords must comply with County Standard of 8 characters with upper and lowercase, numbers, as well as symbols) including multi-factor authentication (MFA) for non-County users.
8. System must provide specific access controls, such as role-based (access according to roles and responsibilities), attribute-based (access based on department, skill, personnel type, etc.), and discretionary access (access as determined by System owner).
9. Administrative and security controls such as, performance monitoring, event monitoring, vulnerability assessments, etc.
10. System must provide patching processes including, but not limited to security fixes and updates.

11. Disaster recovery plan including, but not limited to backup and restore (include RTO and RPO and frequency of backup).
12. Data storage and hosting must include separate tenancy and be situated within the United States with availability for additional storage.
13. APIs are tested utilizing OWASP Web Security Testing Guide/OWASP Software Assurance Maturity Model for potential exploits and protect against vulnerabilities such as, SQL injection, Cross-site scripting attacks, and DoS exploits.
14. System must support multiple environments, including but not limited to production, training, testing/development.
15. Describe the Vendor plan for compliance with all applicable breach notification laws and provide a Root-Cause analysis report.
16. The System must comply with industry standards (e.g., SCORM, AICC) and provide encryption for sensitive course information.
17. Vendor must demonstrate adherence to industry standards such as NIST, SOC2, HIPAA etc. including certifications to ensure both security and privacy.
18. Describe any vendor analytics that will be conducted including the anonymizing of the data.

B. Integration

1. System must have ability to integrate with various HRIS Systems, including Open API, and seamless two-way data synchronization with Workday, to ensure real-time updates between Systems. The System should also support single sign-on (SSO) for enhanced user accessibility and streamlined authentication.
2. System must have ability to have seamless integration with Okta, the County's Identity Management System, via SAML v2.0 or SAML v3.0 only.
3. System must have ability to send training invites compatible with Microsoft Outlook calendar integration.
4. System should have two way integration capabilities with Workday, to establish role hierarchy for workflow and approval structure, establish security roles, ease accounting provisioning and setup, employee management, and data synchronization.
5. System should be able to integrate with other learning systems in the County such as Relias.
6. System should integrate with content authoring tools (e.g., Storyline, Articulate, Adobe, Captivate, Lippincott).
7. System should integrate with competency management tools like Dossier for streamlined tracking of competencies across departments.
8. System should enable integration with external compliance training vendors, such as Resuscitation Quality Improvement (RQI) for CPR, Basic Life Support, Peace Officer Standards and Training (POST), Standards and Training for Corrections (STC), Lexipol for

Law Enforcement, California Child Welfare Training (CACWT) for Social Services, and Healthcare vendors for HIPPA, Critical Incident Reporting, and Fraud and Abuse to streamline course offerings and tracking within the LMS.

C. Other Technology Requirements

1. Compatibility with: Microsoft Edge, Google Chrome, Firefox, and Safari.
2. Provide archiving functionality to separate active from inactive records for efficient data retrieval.
3. System should be Windows-based server architecture.
4. The System should comply with County Technology Standards to ensure System interoperability. See **Appendix A** for details on these standards.

2.4. Organization Size and Staffing

The System will be used by all County departments and may also include County partners, contractors, and volunteers. Each department will identify a lead training coordinator that will be trained on the new System. The medium to large departments may identify staff from each Division or have a Training Team that would be trained on the new System.

Staffing:

As of November 7, 2024, the County employs approximately 7,000 staff members. It is estimated that there will be 80+ super users utilizing the System daily. There is also the potential for an additional 1,500+ non-County partners, contractors, and volunteers who may utilize the System periodically on an as-needed basis. It is essential to ensure that sufficient licenses are available to cover all San Mateo County employees and non-County partners.

2.5. Timeline

The estimated timeline for this project will be from July 2025 – September 2026 to implement the System across the County.

2.6. Implementation and Training

The contractor shall provide a realistic implementation, training plan and schedule (counted in weeks) for roll out of the System to a large organization. The contractor shall also identify whether implementation will be completed by an in-house team or 3rd party provider, and that the implementation (however it is handled) will meet the project timeline as set by the County.

Additionally, the System should meet the following implementation parameters:

- A. Implementation of System will need to include, but will not be limited to: migration of all users, courses and historical data from current LMS, help desk support with wide range of availability and quick response time, and customized training for Administrator(s) and Learner(s).
- B. Support import/export functionalities and one-way integration with Cornerstone for migrating user data, and existing County created course content (PowerPoint decks, worksheets, videos/webinars).
- C. Provide comprehensive training and resources for users to effectively navigate the System, particularly for generating reports and managing course content.

- D. Provide necessary installation and training to use, configure and carry-on maintenance tasks needed to keep the proposed System running.

2.7. System Updates

The System should be updated on a regular basis with new functionality. The release schedule will be communicated in advance to allow the client to perform full regression testing with each release. Validation testing of release must be performed in the testing environment and approved for functionality prior to deployment to production by the client.

3. Submission Requirements

3.1. Submission Deadline

Proposals must be electronically received by 5:00 pm, on Monday, March 3, 2025 via eProcurement system.

Allow sufficient time for the upload to complete by the Due Date and Time. Partial uploads will automatically terminate, and proposals will be rejected. The eProcurement system submission time will be the official submission time. The County will not be responsible for and may not accept proposals that are late due to slow internet connections or for any other failure of the eProcurement system.

NOTE: The County does not maintain the eProcurement system and is not liable for site failures or technical problems. To resolve technical issues, contact OpenGov Technical Support by using the real time chat located in the lower right hand corner of the screen, or via email at procurement-support@opengov.com

<https://procurement.opengov.com/portal/smcgov>

3.2. Pre-submission Registration

Organizations or individuals interested in responding to this solicitation must register online with the County of San Mateo [at](#):

- <https://procurement.opengov.com/portal/smcgov>

It is recommended that organizations complete this registration as soon as possible. The County will not be responsible for and may not accept proposals that are late due to a failure to register in the eProcurement system.

3.3. Submission via eProcurement Portal

Required Documents

Please refer to the [Technical Proposal](#) section for submittal documents and requirements.

Electronic Submissions

Include the proposer name and the RFP title and number in each filename. Submit proposals via the eProcurement website, allowing sufficient time for the upload to complete by the Due Date and Time. As noted above, the eProcurement portal submission time will be the official submission time, and partial uploads will automatically terminate, and proposals will be rejected. Contact [eProcurement Portal](#) with technical questions regarding this site.

Conflicts between Certain Requirements

Prior to the submission deadlines and solely relating to a determination of the timeliness of questions, comments, and proposal submissions, information displayed on the eProcurement portal site will take precedence in the event of a discrepancy between that information and the information within the solicitation documents. For all other discrepancies, the information in the solicitation documents will take precedence.

Format

Documents should be created in the following format:

- Text should be Times New Roman (12-point minimum font size) and unjustified (i.e., with a ragged-right margin)
- Pages should have margins of at least one inch on all sides (excluding headers and footers)
- If the proposal is lengthy, a Table of Contents should be included.
- PDF format is preferred.

Errors in Proposals

The County will not be liable for any errors in proposals. Proposals may be rejected as unresponsive if they are late, incomplete, missing pages or information, or cannot be opened for any reason. The County may waive minor irregularities, but such waiver will not modify any remaining RFP requirements.

4. Minimum Qualifications and Technical Proposal

4.1. Minimum Qualifications

Any proposal that does not demonstrate that the proposer meets these minimum requirements by the submission deadline shall be determined to be non-responsive and not eligible for further consideration in the evaluation process.

Proposer is defined as the prime firm, organization, or joint venture that is submitting a proposal for this RFP.

Proposers must meet the following Minimum Qualifications:

4.1.1. Proposer has at least four (4) years of experience within the last six (6) years immediately preceding the issuance of this RFP in providing LMS software services?*

- ☐ Yes
☐ No

*Response required

4.1.2. Proposer has completed at least three (3) LMS implementation projects within the last five (5) years for public entities that have at least 7,000 staff?*

- ☐ Yes
☐ No

*Response required

4.1.3. Project Manager has a minimum of four (4) years of LMS implementation experience between 2014 and the present and be available for meetings and support during 8AM-5PM PST as necessary during the implementation phase of the project?*

☐ Yes

☐ No

*Response required

4.1.4. Please confirm your firm is registered and in good standing with System for Award Management (SAM)*

[SAM.gov](https://sam.gov)

Firms that have been debarred, suspended, proposed for debarment, declared ineligible by Federal or State agencies will not qualify for a contract award.

☐ Please confirm

*Response required

4.1.5. What is the registered Business Name and Unique Entity ID (UEI) No.?*

- UEI number can be obtained by registering your business through SAM.GOV
- Should you be in the process of obtaining your UEI number, please enter the digits '123' temporarily for your response below in order to proceed with proposal. This temporary number should be replaced with the correct registration number for submission of the proposal.

*Response required

4.1.6. System is Multi-Tenant as stated in Section II. Scope of Work?*

☐ Yes

☐ No

*Response required

4.1.7. System has a Content Management component as stated in Section II. Scope of Work?*

☐ Yes

☐ No

*Response required

4.1.8. System has a Training Management and Certification component as stated in Section II. Scope of Work?*

☐ Yes

☐ No

*Response required

4.1.9. System has an Automated Notifications and Enrollment component as stated in Section II. Scope of Work?*

- ☐ Yes
☐ No

*Response required

4.1.10. System has a Multiple User Roles component as stated in Section II. Scope of Work?*

- ☐ Yes
☐ No

*Response required

4.1.11. System has a Reporting component as stated in Section II. Scope of Work?*

- ☐ Yes
☐ No

*Response required

4.1.12. System has a User Training component as stated in Section II. Scope of Work?*

- ☐ Yes
☐ No

*Response required

4.1.13. System has a Maintenance and Support Desk Services component as stated in Section II. Scope of Work?*

- ☐ Yes
☐ No

*Response required

4.2. Written Proposal

NOTE: Each one-sided letter-sized page is considered one page of content.

Pages that exceed the maximum page limit may not be reviewed or scored.

Proposers interested in responding to this RFP must submit the following information, in the order specified below:

4.2.1. Technical Proposal (Maximum of 35 Pages)*

A. Introduction and Executive Summary (up to 1 page)

1. Submit a letter of introduction and executive summary of the proposal. The letter must contain:
 - a. Name, title and contact information (email, phone, and address) for representative of proposer that is responsible for communication related to this RFP.
 - b. Name, title, contact information, and signature of person authorized to obligate firm to perform the commitment contained in the proposal.

2. Submission of the letter will constitute a representation by proposer that it is willing and able to perform the commitments contained in the proposal and has not violated the terms of this RFP.

B. Statement of Minimum Qualifications (up to 5 pages)

1. Describe how the proposer meets the minimum qualifications as set forth in Minimum Qualifications of this RFP.
2. Submission of yes/no and confirmation answers to the Minimum Qualifications questions is not a substitute for providing a detailed written response.

C. Project Approach (up to 16 pages) - Describe the services and activities that your firm proposes to provide to the County. Include the following information:

1. Describe your customer service philosophy
2. Describe how the proposed System meets the ideal System that is described in Section II: Scope of Work
3. Describe the implementation plan and timeline, clarify if implementation services will be provided by in- house staff or sub-contractor. If by sub-contractor please specify the firm and their experience.
4. Describe the approach for data migration into the System.
5. Describe how the firm will complete the project within the County's required time frame noted in Section II. Timeline.
6. Detail the training plan and timeline for different levels of staff usage, detail if the training services will be provided by in-house staff or sub-contractor. If by sub-contractor please specify the firm and their experience.
7. Detail how the System will meet Section II. Technology and Security Requirements
8. Describe the innovations that your firm will provide for this System that makes it stand out in the marketplace, including but not limited to efficiency, technology and reporting.
9. Detail the plan for achieving performance measures stated in Section II.

D. Firm Qualifications (up to 7 pages) - Provide information regarding background and qualifications, including the following:

1. A brief description of the proposer.
2. A list of current government clients.

3. A description of not more than three (3) projects similar in size and scope conducted by the proposer, including the client, primary staff members involved, budget, schedule, and project summary. Descriptions should be limited to one (1) page for each project.
4. If subcontractors are anticipated, identify them (if known) and provide information on how they will be used.

E. Team Qualifications (up to 6 pages)

1. Provide a chart identifying:
 - a. Project team and reporting structure
 - b. Lead project manager
 - c. Role each person will play in the project
2. Provide a brief description of the experience and qualifications of the project team members, including short resumes if desired. Identification of a lead project manager is required.
3. Provide examples and details (if they are not repeated from section D3 above) of relevant System implementation projects that the project manager has completed in the last two (2) years.
4. Written assurance that the key individuals listed and identified will be performing the work and will not be substituted with other personnel or reassigned to another project without the County's prior approval.

*Response required

4.2.2. Fee Proposal (Maximum of 5 Pages)*

The Fee Proposal should be submitted as a separate PDF file from the Technical Proposal.

The County intends to award this contract to the firm(s) that it considers will provide the best overall product and services. Travel expenses should not be included in the fee proposal and will not be covered by the contract.

Please provide a fee proposal that includes all the products and services necessary to meet the requirements outlined in Section II. Scope of Work.

Proposals that offer additional preferred services or additional suggested services, in addition to the requirements outlined in Section II. Scope of Work should separately detail any additional cost.

Proposals that offer additional services should separately detail any additional costs.

There is no cap for the number of products and services on which you are allowed to bid.

A. Requested Format to List Fees for Products and Services

Line Item	Description	Quantity	Fee Proposal	Notes
Annual Recurring Costs:				
1	Annual Platform Subscription Fee(s) for all County employees	1		
2	Other/Miscellaneous	1		
One Time Costs:				
1	Implementation Fees	1		
2	Training Fees	1		
3	Other/Miscellaneous	1		
First Year Grand Total				
Second Year Grand Total				
Third Year Grand Total				
Fourth Year Grand Total				
Fifth Year Grand Total				
GRAND TOTAL COST FOR 5 YEARS				
(Option 1) Sixth Year Grand Total				
(Option 1) Seventh Year Grand Total				
(Option 1) Eighth Year Grand Total				
(Option 1) Ninth Year Grand Total				
(Option 1) Tenth Year Grand Total				
GRAND TOTAL COST FOR 10 YEARS				

1. Please provide a detailed explanation of the cost to be charged to the County for all products and services, as listed above. The explanation should clearly identify the cost of all products and services defined in your proposal.

The County reserves the right to accept other than the lowest priced offer and to reject any proposals that are not responsive to this request.

*Response required

5. Evaluation and Selection Criteria

The proposals will be evaluated by a selection committee with relevant expertise. The County intends to evaluate the proposals generally in accordance with the criteria itemized below. Proposers with the highest scoring proposals may be interviewed by the committee to make the final selection.

5.1. Minimum Qualifications

No.	Evaluation Criteria	Scoring Method	Weight (Points)
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1.	Minimum Qualifications Minimum Qualifications will be evaluated on a pass/fail basis.	Pass / Fail	1 <i>(100% of Total)</i>
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5.2. Technical and Fee Proposal

No.	Evaluation Criteria	Scoring Method	Weight (Points)
1.	Project Approach A. Demonstrates a clear understanding of the requested ideal System detailed in Section II - SOW and how the proposed System meets the project request. B. Feasibility of the project implementation plan. C. Ability to complete the project within the County's timeline. D. Ease of use of the System vs hours of training needed to get started. E. Ability to meet the technology considerations. F. Usefulness of innovations and how developed the Optional services are.	Points Based	40 <i>(40% of Total)</i>
2.	Firm Qualifications A. Experience and expertise of the firm in providing LMS services. B. Experience and expertise of the firm within a local government/ public sector environment. C. History of company and length of time in business.	Points Based	20 <i>(20% of Total)</i>
3.	Team Qualifications A. Experience and expertise of the lead project manager in implementing and providing learning management services. B. Expertise of assigned staff in the subject area and description of the tasks to be performed by each staff person. C. Reasonableness of proposed staffing level and allocation plan.	Points Based	15 <i>(15% of Total)</i>

4.	Fee Proposal <p>The table below explains the method by which the fee proposal is scored. The lowest cost proposal will receive the maximum number of points assigned to the fee proposal evaluation criteria. All other proposals will be assigned points by dividing the amount of the lowest total fee proposed by the amount of their respective total fee proposed and then multiplying the resulting number by the maximum number of points available to receive the proposer's score.</p> <p>For example, if a total of 25 points are assigned to evaluate the fee proposal, Firm A offers the lowest fee proposal of \$1000 and receives all 25 points. Firm B is the next lowest fee proposal that offers \$1200 and receives a score of 20.8 points (\$1000 divided by \$1200 multiplied by 25 points). Firm C has the highest fee proposal that offers \$1500 and receives a score of 16.7 (\$1000 divided by \$1500 multiplied by 25 points).</p> <table> <tr> <th>Firm</th><th>Firm A</th><th>Firm B</th><th></th></tr> <tr> <td>Total Cost</td><td>\$1000</td><td>\$1200</td><td></td></tr> <tr> <td>Calculation</td><td>-</td><td>$\frac{1000}{1200}$</td><td></td></tr> <tr> <td>Points Achieved %</td><td>1.0</td><td>0.83</td><td></td></tr> <tr> <td>Points (Max 25)</td><td>25</td><td>20.8</td><td></td></tr> </table>	Firm	Firm A	Firm B		Total Cost	\$1000	\$1200		Calculation	-	$\frac{1000}{1200}$		Points Achieved %	1.0	0.83		Points (Max 25)	25	20.8		Points Based	25 (25% of Total)
Firm	Firm A	Firm B																					
Total Cost	\$1000	\$1200																					
Calculation	-	$\frac{1000}{1200}$																					
Points Achieved %	1.0	0.83																					
Points (Max 25)	25	20.8																					

5.3. Virtual Oral Interview

No.	Evaluation Criteria	Scoring Method	Weight (Points)
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1.	<p>Experience</p> <p>Following the evaluation of the written proposals, up to the top 5 proposers receiving the highest scores will be invited to a 30-minute virtual oral interview. The interview will consist of standard questions asked of each of the proposers, covering these areas:</p> <p><u>Experience (20 points):</u> Points will be awarded based on the relevance and complexity of the firm's previous work. Demonstrating the expertise of the team through examples of similar projects will be a key factor in scoring. Firms with direct experience in projects of comparable scale, scope, and sector will score higher.</p>	Points Based	20 (40% of Total)
2.	<p>Approach to Implimentation</p> <p><u>Approach to Implementation (10 points):</u> Understanding of the key long-range and short-range implementation issues that affect the project. Quality of the insight or conceptualization of the issues relevant to the project.</p>	Points Based	10 (20% of Total)

3.	Communication <u>Communication (10 points)</u> : This criterion evaluates the clarity and effectiveness of communication during the oral interview. Points will be awarded for the logical organization of ideas, ease of understanding, and the team's ability to clearly articulate their qualifications and proposed approach. Effective verbal explanations, structured presentation flow, and any visual aids or examples used during the interview to enhance clarity will contribute to a higher score.	Points Based	10 (20% of Total)
4.	Management <u>Management (10 points)</u> : Points will be awarded based on the firm's ability to manage previous projects efficiently, including staying within budget and meeting deadlines. Evidence of how challenges were handled and resolved will be considered, along with documentation showing adherence to project timelines and financial management practices. Firms with a track record of delivering projects on time and on budget will receive higher scores.	Points Based	10 (20% of Total)

5.4. Virtual Product Demonstration

No.	Evaluation Criteria	Scoring Method	Weight (Points)
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1.	<p>System Functionality</p> <p>After the oral interviews, up to the top 3 highest-scoring proposers will be invited to conduct a 90-minute virtual product demonstration of their LMS. These demonstrations will allow the selection committee to evaluate how well the proposed System meets the County’s needs in real-world scenarios. The product demonstration will be evaluated based on the following criteria:</p> <p><u>System Functionality (20 points)</u>: Proposers must demonstrate the core functionalities of their LMS, especially those that align with the County's requirements. Points will be awarded based on ease of navigation, user interface, and the ability to perform key tasks such as course creation, user management, tracking progress, and generating reports. The demonstration should highlight the flexibility of the System to support various learning formats (e.g., e-learning, virtual and in-person trainings) and its ability to integrate with existing tools and platforms.</p>	Points Based	20 (40% of Total)
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2.	User Experience <u>User Experience (10 points)</u> : This criterion evaluates the overall user experience for both administrators and learners. The System should have an intuitive and user-friendly interface that allows users to easily navigate and complete tasks. Points will be awarded based on how well the System can accommodate different user roles (e.g., learners, instructors, administrators), how customizable the experience is for different users, and how effectively it enhances the learning process.	Points Based	10 <i>(20% of Total)</i>
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3.	Customization and Scalability <u>Customization and Scalability (10 points):</u> Proposers will be evaluated on the LMS's ability to be customized to meet the specific needs of the County, including branding, workflows, and permission settings. The System's ability to scale as the County's learning programs grow or its requirements change will also be assessed. Points will be awarded for the flexibility to add new features, expand capacity, and support large numbers of users without compromising performance.	Points Based	10 (20% of Total)
4.	Reporting and Analytics <u>Reporting and Analytics (5 points):</u> Points will be awarded based on the depth and clarity of the LMS's reporting and analytics capabilities. Proposers should demonstrate how administrators can generate, customize, and export reports on learning progress, compliance, and other key metrics. Advanced analytics tools, such as tracking learner engagement, predictive insights, or real-time data visualization, will also be evaluated.	Points Based	5 (10% of Total)

5.	<p>Advanced Functionality</p> <p><u>Advanced Functionality (5 points)</u>: This criterion assesses the additional, innovative features of the LMS beyond standard capabilities. Points will be awarded for demonstrating advanced tools such as, but not limited to, AI-driven personalized learning paths, gamification elements to boost engagement, mobile learning features for on-the-go access, social learning functionalities, or advanced compliance management. These features should be shown to improve both learner engagement and the overall efficiency of learning program administration.</p> <p>After interviewing and product demonstrations, the final score for each proposer will be determined by combining the Oral Interview score and the Product Demonstration score with the Technical Proposal score, for a total score out of 200 points. The County will award the contract to the firm whose final scores reflect an outstanding ability to provide the services outlined in Section II – Scope of Work.</p>	Points Based	<p>5 (10% of Total)</p>
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6. Instructions to Proposers

6.1. Instructions

Proposers are encouraged to attend a pre-proposal conference on Tuesday, February 4, 2025, at 1:00 pm, to be held at Online ZOOM - <https://smcgov.zoom.us/j/88044081085>. All questions will be addressed at this conference and any available new information will be provided at that time. If you have further questions regarding the RFP, please post them on the eProcurement portal.

6.2. Communications

- A. As of the issuance date of this RFP and continuing until it is canceled or an award is made, no proposer or person acting on behalf of a prospective proposer may discuss any matter relating to the RFP with any officer, agent, or employee of the County, other than through eProcurement portal, to the Authorized Contact Person, or as outlined in the evaluation or protest procedures.
- B. Proposers (including any agent, owner, employee, board members, or other such affiliates) shall not offer any gift, favor, or other personal benefit to any County officer or employee during the procurement process for this agreement, including during the solicitation period and contract negotiations.

Violation of the foregoing prohibitions may result in a proposer being found non-responsible and barred from participating in this or future procurements.

6.3. Contract Award

A. Award Procedure

Contract negotiations are neither an offer nor guarantee that a contract will be executed. A contract award, if any is made, will be to the responsive, responsible proposer offering the overall best value to the County for the services and goods described in this solicitation, or as applicable, for a specific portion of the services and goods described. Any agreement reached will be memorialized in a formal agreement using the attached template, executed by the appropriate authority.

B. Notice of Intent to Award

If a decision is made to take steps to enter into an agreement with one or more proposers, the County will post a Notice of Intent to Award or otherwise notify proposers the remaining proposers of their non-selection. Notice may instead be provided by including approval of the agreement as an item on an agenda for a meeting of the Board of Supervisors.

C. Commencement of Performance

After all parties have signed the agreement, the County will notify the contractor and performance may proceed. Prior to execution of the agreement by the County, no County employee may authorize work under the agreement. Any work performed prior to the full execution of the Agreement may not be compensated.

6.4. Term

Human Resources Department is issuing Request for Proposal (RFP) No. 2025-RFP-00371 for Request for Proposals (RFP) for Learning Management System (LMS).

The agreement shall have a term of five (5) years. In addition, the County shall have one (1) option to extend the term for an additional period not to exceed two years, which the County may exercise in its sole, absolute discretion. To exercise this option, the County shall provide written notice to the Contractor at least thirty days before the end of the agreement's term.

The County's standard contract template has been included with this solicitation. The awarded contractor will be expected to sign an agreement prepared by the County using this template. Please ensure that your firm has completed legal review of these contract terms. If your firm wishes to request exceptions to these standard terms, submit a Contract Exceptions Request by the Deadline for Questions, Comments and Contract Exceptions listed in the Solicitation Schedule below. The County will consider Contract Exceptions Requests but reserves the right to reject requested modifications to its standard terms.

7. Terms and Conditions for Receipt of Proposals

7.1. Errors, Omissions and Inquiries regarding the RFP

Proposers are responsible for reviewing all portions of this RFP. Proposers are to notify the department, in eProcurement portal, if the proposer discovers any ambiguity, discrepancy, omission, or apparent error in the RFP. Such notification should be made promptly after discovery, but in no event later than five business days prior to the deadline for receipt of proposals. Modifications and clarifications will be made by addenda as provided below.

Inquiries regarding the RFP should be lodged in eProcurement portal.

7.2. Objections to RFP Terms

Should a proposer object on any ground to any provision or legal requirement set forth in this RFP, the proposer must, not more than ten calendar days after the RFP is issued, provide written notice to the department, via eProcurement portal, setting forth with specific grounds for the objection.

7.3. Addenda

The County may cancel, revise, or reissue this RFP, in whole or in part, for any reason. Revisions will be posted as Addenda on eProcurement portal. No other revision of this RFP is valid. Proposers shall be responsible for ensuring that their proposals reflects any and all Addenda issued by the County prior to the proposal due date regardless of when a proposal is submitted. Therefore, the County recommends that proposers consult eProcurement portal frequently, including shortly before the proposal due date, to confirm that all Addenda have been downloaded.

7.4. Term of Proposal

Submission of a proposal signifies that the proposed services and prices are valid for the duration of the proposed agreement term and that the quoted prices are genuine and not the result of collusion or any other anti-competitive activity.

7.5. Revision or Withdrawal of Proposal

A proposer may revise a proposal on the proposer's own initiative at any time before the deadline for submission of proposals. The proposer must submit the revised proposal in the same manner as the original on or before the proposal due date.

A proposer may withdraw a proposal at any time before the deadline for submission of proposals. After that time, whether or not a new RFP is issued for the same subject matter, withdrawal of a proposal may preclude the proposer from participating in the procurement as a proposer or subcontractor, except that an original equipment manufacturer may participate indirectly through a reseller.

7.6. Errors and Omissions in Proposal

The County will not be liable for any errors in proposals. Proposals may be rejected as unresponsive if they are incomplete, are missing pages or information, or cannot be opened for any reason. The County may waive minor irregularities, but such waiver will not modify any of the remaining RFP requirements.

7.7. No Commitment

Neither submission of a proposal nor the County's receipt of proposal materials confers any right to the proposer nor any obligation on the County. This RFP does not commit the County to award a contract.

7.8. Financial Responsibility

The County shall have no financial responsibility for any costs incurred by a firm in responding to this RFP or participating in any presentations or negotiations.

7.9. Estimated Quantity

If the RFP results in an indefinite quantity or a requirements agreement, the goods and services actually requested by the County may be less than the maximum value of the agreement and there is no guarantee, either expressed or implied, as to the actual quantity of goods and services that will be authorized under the agreement.

7.10. Public Record

A. General

1. All proposals, protests, and information submitted in response to this solicitation will become the property of the County and will be considered public records. As such, they may be subject to public review.
2. Any contract arising from this RFP will be a public record.
3. The County is not seeking proprietary information and will not assert any privileges that may exist on behalf of the proposer.
4. Submission of any materials in response to this RFP constitutes:
 - Consent to the County's release of such materials under the Public Records Act without notice to the person or entity submitting the materials; and
 - Waiver of all claims against the County and/or its officers, agents, or employees that the County has violated a proposer's right to privacy, disclosed trade secrets, or caused any damage by allowing the proposal or materials to be inspected; and
 - Agreement to indemnify and hold harmless the County for release of such information under the Public Records Act; and

- Acknowledgement that the County will not assert any privileges that may exist on behalf of the person or entity submitting the materials.

7.11. Reservations of Rights by the County

The issuance of this RFP does not constitute an agreement by the County that any contract will actually be entered into by the County. The County expressly reserves the right at any time to:

- Waive or correct any defect or informality in any response, proposal, or proposal procedure;
- Reject any or all proposals;
- Reissue an RFP;
- Prior to submission deadline for proposals, modify all or any portion of the selection procedures, including deadlines for accepting responses, the specifications or requirements for any materials, equipment or services to be provided under this RFP, or the requirements for contents or format of the proposals;
- Procure any materials, equipment or services specified in this RFP by any other means; or
- Determine that no project will be pursued.

7.12. No Waiver

No waiver by the County of any provision of this RFP shall be implied from any failure by the County to recognize or take action on account of any failure by a proposer to observe any provision of this RFP.

7.13. Cooperative Agreement (Piggyback)

This competitive solicitation is being conducted as a Cooperative Procurement. The services, terms and conditions of any agreement resulting from this solicitation may be used by other organizations as a Cooperative Agreement.

This provision in no way commits any affiliate to procure services from any awarded contractor, nor does it guarantee that any additional orders will result. At their discretion, and subject to their own procurement policies, interested organizations may make use of this competitive procurement and contract directly from the awarded contractor.

8. Protest Procedures

8.1. Protest of Non-Responsiveness Determination

Within five (5) working days of the County's issuance of a notice of non-responsiveness, any firm that has submitted a proposal and believes that the County has incorrectly determined that its proposal is non-responsive may submit a written notice of protest. Such notice of protest must be received by the County on or before the fifth working day following the County's issuance of the notice of non-responsiveness. The notice of protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The protest must be signed by an individual authorized to

represent the proposer, and must cite the law, rule, local ordinance, procedure or RFP provision on which the protest is based. In addition, the protestor must specify facts and evidence sufficient for the County to determine the validity of the protest.

8.2. Protest of Contract Award

Within five (5) working days of the County's issuance of a notice of intent to award the contract, any firm that has submitted a responsive proposal and believes that the County has incorrectly selected another proposer for award may submit a written notice of protest. Such notice of protest must be received by the County on or before the fifth working day after the County's issuance of the notice of intent to award.

The notice of protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The protest must be signed by an individual authorized to represent the proposer, and must cite the law, rule, local ordinance, procedure or RFP provision on which the protest is based. In addition, the protestor must specify facts and evidence sufficient for the County to determine the validity of the protest.

8.3. Delivery of Protests

All protests must be received by the due date. If a protest is mailed, the protestor bears the risk of non-delivery within the deadlines specified herein. Protests should be transmitted by a means that will objectively establish the date the County received the protest. Protests or notice of protests made orally (e.g., by telephone) will not be considered. Protests must be delivered to:

Protests@smcgov.org

Subject: Request for Proposals (RFP) for Learning Management System (LMS), 2025-RFP-00371