



REQUEST FOR INFORMATION

Title: Learning Management System

Reference No.: 1220-050-2020-007

(General Services)

Issue Date: June 25, 2020

1. INTRODUCTION

1.1 Purpose of this Request For Information

Through this RFI, the City of Surrey (the “City”) is seeking responses from Respondents (the “Respondent”) who offer goods and/or services in the information technology market space – the scope is also commonly known as business problem statements to address problems (refer to Schedule A – Business Problem Statements for more detail). Our focus in this RFI is to consult the market and explore potential organizational and technological solutions to meet our learning management system business problem statements, including ideas and recommendations on strategy, scope and approach.

Interested parties are invited to respond to this RFI by submitting a response (the “Response”) to the City. Responses should include ideas, information and recommendations that could result in a clarification of requirements, cost-savings opportunities and the identification of potential problem areas with this initiative.

This RFI is intended to gather information that could assist the City in the development of a future procurement process, or processes (i.e., RFxs). In the event that sufficient information is received from this RFI, the City may, but is not obligated to, initiate a competitive procurement opportunity, or opportunities.

If a subsequent competitive procurement opportunity or opportunities are issued, the City is under no obligation to advise any Respondent responding to this RFI. Respondents are advised to monitor the City website and BC Bid website for any such opportunities, which will be open to all suppliers regardless of whether or not a response to this RFI has been submitted.

Respondents must not respond with any proprietary or confidential information as any information and/or recommendations in response to this RFI may be used by the City in determining the structure and content of any subsequent procurement opportunity, or opportunities. So please be careful not to send anything you might consider confidential.

The City reserves the right to invite additional responses from suppliers that did not respond to this RFI for any reason.

2. INSTRUCTIONS TO RESPONDENTS

2.1 Address for Delivery

A Response should be labelled with the Respondent’s name, RFI title and number. A Response should be submitted in the form as set out below.

The Respondent should submit a Response electronically in a single pdf file which must be delivered to the City by email at: purchasing@surrey.ca

PDF emailed Responses are preferred and the City will confirm receipt of emails. Note that the maximum file size the City can receive is 10Mb. If sending large email attachments, Respondent’s should phone [604-590-7274] to confirm receipt. A Respondent bears all risk that the City’s computer equipment functions properly so that the City receives the Response.

2.2 Date

The City would prefer to receive Responses on or before July 16, 2020. The City's office hours are 8:30 a.m. to 4:00 p.m., Monday to Friday, except statutory holidays.

2.3 Inquiries

All inquiries related to this RFI should be directed in writing to the person named below (the "City Representative"). Information obtained from any person or source other than the City Representative may not be relied upon.

Name: Richard D. Oppelt, Manager, Procurement Services

E-mail: purchasing@surrey.ca

Reference: 1220-050-2020-007

2.4 Addenda

If the City determines that an amendment is required to this RFI, the City's Representative will issue a written addendum by posting it on the BC Bid Website at www.bcbid.gov.bc.ca (the "BC Bid Website") and the City Website at www.surrey.ca (the "City Website") that will form a part of this RFI. No amendment of any kind to the RFI is effective unless it is posted in a formal written addendum on the City Website. Upon submitting information, Respondents will be deemed to have received notice of all addenda that are posted on the City Website.

2.5 No City Obligation

This RFI is not a tender, request for proposals or a request for quotations and does not commit the City in any way to select a preferred Respondent or Respondents, or to proceed to negotiations for a Contract, or to award any Contract, and the City reserves the complete right to at any time reject all Responses, and to terminate this RFI process.

2.6 Respondent's Expenses

Respondents are solely responsible for their own expenses in preparing and submitting Responses, and for any meetings, negotiations or discussions with the City or its representatives and consultants, relating to or arising from the RFI. The City and its representatives, agents, consultants and advisors will not be liable to any Respondent for any claims, whether for costs, expenses, losses or damages, or loss of anticipated profits, or for any other matter whatsoever, incurred by the Respondent in preparing and submitting a Response, or any other activity related to or arising out of this RFI.

2.7 No Contract

By submitting a Response and participating in the process as outlined in this RFI, Respondents expressly agree that no contract of any kind is formed under or arises from this RFI.

2.8 Conflict of Interest

A Respondent should disclose in its Response any actual or potential conflicts of interest and existing business relationships it may have with the City, its elected or appointed officials or employees. The City may rely on such disclosure.

2.9 Confidentiality

All Responses become the property of the City and will not be returned to the Respondent. All Responses will be held in confidence by the City unless otherwise required by law. Respondents should be aware the City is a "public body" defined by and subject to the *Freedom of Information and Protection of Privacy Act* of British Columbia.

3. RESPONSE FORM AND CONTENTS

3.1 Response Content

There is no Response form to fill out. Respondents should provide a concise and focused written response to the following items in the order listed:

- (a) a brief Respondent profile;
- (b) include a document that explains how Respondent's goods and/or services can be used to address the business problem statement(s) listed in Schedule A – Business Problem Statements;
- (c) include ideas, information and recommendations that could result in clarification of requirements;
- (d) identification and discussion of potential problem areas with this initiative, including cost savings opportunities that the Respondent recommends the City consider when establishing its future business requirements;
- (e) relevance of solution – demonstrations of successful projects, case studies and best practices with other service organizations;
- (f) high level cost estimate(s), for budgeting purposes only;
- (g) any other information specific to the nature of this RFI and deemed important by the Respondent; and
- (h) any other information specific to the nature of this RFI and deemed important by the Respondent.

Respondents are specifically requested not to submit detailed price proposals (other than high-level cost estimates for budget purposes noted in item (f) above), or provide information about the experience or qualifications of their company or individuals in their company.

Respondents to this RFI consent to the City incorporating any submitted ideas, concepts, approaches, or strategies into any planning, design, procurement, or contractual activities related to any aspect of the project without any obligation, liability, or consideration on the part of the City.

This RFI will not be used to evaluate, rank or select suppliers, nor will it be used to pre-qualify or screen Respondents for a subsequent competitive procurement opportunity, if any.

3.2 Cost Estimates (High-Level)

Any cost estimates provided are for budgeting purposes only. Respondents will not be held to price estimates provided as part of the RFI should the City later decide to issue a competitive solicitation.

3.3 Additional Information

The City may, at its discretion, request clarifications or additional information from a Respondent with respect to any Response and the City may make such requests to only selected Respondents.

3.4 Interviews

The City may, at its discretion, invite some or all of the Respondents to appear before the City to provide clarifications of their Response. Note: The City reserves the right to arrange for a follow-up meeting with any Respondent whose initial presentation was sufficiently informative and indicative of more to be learned. If this provision is exercised, it is NOT to be interpreted as a short-list of preferred Respondents, rather as an opportunity for City staff to better understand a particular response.

We appreciate your time and your help with our information-gathering and we look forward to hearing from you.

SCHEDULE A – BUSINESS PROBLEM STATEMENTS

The following business problem statements encapsulate the information management problems faced by the City, to which Responses to this RFI should be directed.

The City of Surrey (the “City”) is requesting information for the potential acquisition of a Learning Management System (LMS) to aid and enhance its process by which learning content and material is hosted, tracked and delivered. The City currently does not have an LMS in place but rather processes which fulfill some of the functions.

1. PROBLEM STATEMENTS

The City has outlined below some examples of problem statements that require further exploration and enhancement. This is, by no means, an exhaustive list, rather a representation of some of the current needs of various business sections across the City. Please consider these when preparing your Response.

A. Digital Content Hosting

The City currently does not have the ability to host online learning content. It is the desire to be able to host a variety of e-learning content, varying from but not limited to:

- Static Content

This content includes but is not limited to:

- Policies and procedures that must be read and agreed to with signature;
- Instructions and manuals;
- Readings and case studies;
- Learning comprehension tests and quizzes;
- Authored SCORM compliant e-learning modules; and
- External e-learning content libraries, subscription or other.
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- Video and audio presentations

This content includes but is not limited to:

- Asynchronous learning through pre-recorded classes or workshops; and
- Presentations either pre-recorded or linked externally.

- Live virtual classrooms

This learning will enable staff to learn through various capabilities, but not limited to:

- Synchronous learning through live instructor presentation and class interaction;
- Whiteboarding, live chat, video streaming, polling abilities and breakout spaces for group work; and
- Allowing learners to conference call into a classroom.

Further, access to online e-learning will ideally be available from any device, anywhere, allowing for higher levels of accessibility. Learning should be available online, offline, from a computer or mobile device.

B. Digital Content Delivery and Management

The current delivery of learning content at the City is performed primarily through instructor-led facilitation, in a face-to-face manner within a classroom setting. Registration for classes is managed through a legacy self-serve registration system, where individuals are required to navigate to their desired course and register. There are current limitations in the way that registration is tracked, and how notifications are raised to the instructor and student.

- Searching
A solution should be flexible allowing courses to be searchable on wide variety of parameters such as, but not limited to topic, availability, date.
- Registration
There are current limitations in the way that registration is tracked, and how notifications are raised to the instructor and student. A solution should be adaptable in allowing staff members to self-register/withdraw, managers to proactively register/withdraw their staff, or training admin staff to register/withdraw an individual at their discretion. Additionally, registration should be a metric that is tracked to gain awareness of the demand for courses.
- Management
A solution should be able to provide the City with a means to define management rules for registrations such as, but not limited to course size, waitlist size and notification workflows. The solution should be capable of self-administering class lists through automating accepting and wait-listing registrants based on defined parameters. Further, a solution should be able to provide roles-based access controls to administer multiple views and perspectives.

C. Tracking and Reporting of Learning and Achievements

The City currently does not have the capability to track and report on the learning and achievements received by individuals, teams, departments and the organization as a whole.

- Reporting
A solution should be capable of providing insights into the learning accomplishments of an individual, team, department and organization. There is a need to be able to access this information in an ad-hoc real-time fashion to aid understanding gaps in training, baselining minimum education levels, as well as identifying specializations that the organization may have. The solution should be able to capture and enter validation of diverse learning experiences without requiring centralized entry of this information - e.g. post secondary education, certifications, conference attendance, external training.
- Management
There are current limitations with how managers can proactively assess their workforce's training needs. For example, a solution should provide the ability to raise notifications indicating expired credentials and raise to individuals their required renewal for specific training.

D. Integrations with Existing Systems and Applications

The City currently has many systems and applications that are actively operating in the production environment. In order to ensure scalability and high cohesion amongst any applications entering this environment, it is favourable that there is a means for integration. In addition to integrations, access to data that is stored in a database would further this notion of scalability. The City desires these capabilities by means of an API, or other recommended access models for integrations with the following systems and applications, but not limited to:

- Microsoft Office Suite
A solution should provide integration capabilities with applications in the Microsoft Office Suite, such as Microsoft Outlook. e.g. The capability to auto-populate/remove calendar events and reminders for registered/withdrawn staff members
- PeopleSoft
A solution should provide capabilities to allow people records and profiles for individual staff members to be updated from PeopleSoft. Conversely, a solution should also have the capabilities to update people records and profiles in PeopleSoft.
- Reporting
A solution should provide capabilities to allow external reporting tools to consume data that is collected and stored.

2. MINIMUM MANDATORY REQUIREMENTS

The City has the following minimum mandatory requirements that a solution must be able to meet.

REQUIREMENTS	
#	Requirement
1	Adherence to FOIPPA (Freedom of Information and Protection of Privacy Act).
2	Adherence to CASL (Canadian Anti-Spam Legislation).
3	Compliance with an established cloud security standard that is acceptable to government (ISO 27017, NIST 800-53, or CSA CCM).
4	Demonstratable annual compliance with cloud security framework via third party attestation and the City maintains right to audit components.
5	Ability to enable security investigations, online access to evidence, and legal discovery.
6	The platform must be SCORM compliant.