



Request for Proposals (RFP)

Learning Management System for Extended Enterprise/Multi-Tenant

CIS
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RFP Schedule	
Issuance of RFP:	January 26, 2026
Submission of Questions about the RFP:	February 6, 2026, 5:00 p.m. (PT)
Proposal Due:	March 2, 2026, 5:00 p.m. (PT)
Successful Proposer Selected:	June 1, 2026
Anticipated Commencement of Contract:	June 5, 2026

A membership service of:



**REQUEST FOR PROPOSALS
FOR
LEARNING MANAGEMENT SYSTEM FOR
EXTENDED ENTERPRISE/MULTI-TENANT**

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I. INTRODUCTION

A. PURPOSE

The purpose of this Request for Proposals (RFP) is to solicit offers from qualified vendors to provide a comprehensive, modern web-based Learning Management System (LMS) solution that includes both a robust LMS platform and access to high quality off-the-shelf online training content for use by CIS and its members.

CIS seeks an LMS that supports an extended enterprise environment and enables the delivery, administration, tracking, reporting, and auditing of learning activities for CIS staff and employees of CIS member organizations. The proposed solution must support a wide range of learning modalities, including asynchronous, synchronous, blended, and mastery-based learning experiences.

In addition to core LMS functionality, CIS places a high priority on the availability of off-the-shelf course content aligned with public sector, risk management, workplace safety, leadership, compliance, and professional development needs. CIS is currently utilizing OpenSesame as its primary off-the-shelf content provider and intends to prioritize solutions that offer seamless continuity of existing course offerings, learner access, reporting, and historical training records. This may be achieved through direct OpenSesame integration, an equivalent content marketplace, or a clearly documented and validated content transition strategy.

Proposers may offer an integrated LMS and content solution or propose partnerships with third party content providers. Proposals must clearly distinguish between LMS platform functionality and content licensing models, including bundled content, optional subscriptions, marketplace access, and associated costs.

CIS intends to select a solution that minimizes disruption to learners and administrators, preserves prior learning investments, and provides a scalable, future-ready learning ecosystem that supports the evolving needs of public sector organizations.

B. BACKGROUND

CIS is a public entity risk pool that provides insurance and risk management services to Oregon cities and counties and other public entities created by these cities and counties. Based in Wilsonville, CIS was formed in 1981 by its parent organizations, the League of Oregon Cities and Association of Oregon Counties. The majority of cities and counties in Oregon participate in one or more CIS programs (property, liability, and health benefits). These participating entities are considered **CIS members**. Currently, about 370 public entities are members.

II. SCOPE OF WORK

The successful Proposer will provide a hosted, web-based Learning Management System designed to support a large-scale extended enterprise, multi-tenant environment, including CIS staff, member organizations, and their employees. The LMS must support the delivery, administration, tracking, reporting, auditing, and long-term governance of learning activities sourced from CIS developed content, third party providers, and off-the-shelf content libraries.

Requirements include, but are not limited to, those described below. Additional details regarding these requirements, as well as other requested features, are in [Appendix B](#):

1. A web-based, hosted solution, that is platform- and device-agnostic.
2. Scalable platform capable of supporting at least 16,000 active users, retaining historical data for a minimum of an additional 20,000 inactive users, and accommodating projected growth in both users and course activity over the life of the contract.
3. 24x7 access to LMS.
4. Support for synchronous and asynchronous training.
5. The LMS must enforce strict separation between CIS member entities, ensuring that learners and entity administrators cannot view or access any other member's users, records, resources, or content. The system must also support differentiated administrative permissions that allow entity-level administrators to add, edit, manage, and assign their own courses, files, and learning resources, while preventing them from adding, editing, modifying, or retiring any CIS-managed global/Super Admin content or catalog elements. See [Appendix C](#) for a graphical illustration of the intended hierarchy structure.
6. Data migration services including historical learner data, course completions, transcripts, certifications, and metadata from CIS' current LMS and associated content providers, including OpenSesame. Proposers must clearly identify migration assumptions, limitations, dependencies, validation processes, and post migration support responsibilities.
7. Demonstrated support for off-the-shelf course content through native libraries, integrated marketplaces, or third-party partnerships. Proposers must describe available content domains, update cadence, content governance, and alignment with public sector training needs. Preference will be given to solutions that support continuity of CIS' existing OpenSesame course catalog or provide clearly mapped equivalent offerings.
8. Technical support available at least Monday through Friday, 8:00 a.m. to 5:00 p.m. (PT).
9. Single sign-on integration support, JSON Web Token preferred.

10. REST API that supports service level authentication and scope for the following minimal activities: user registration, user search/lookup, user read, contact update, course registration, course completion.
11. Preferred, but not required, webhook functionality for user registration, contact update, course registration, course completion.
12. Proposers must clearly differentiate LMS platform functionality and costs from content licensing models, including bundled content, optional subscriptions, marketplace pricing, per user fees, and usage-based pricing structures. Proposers must describe how content costs scale over time. Current course domains include but are not limited to the following:
 - i. Business Skills
 - ii. Compliance
 - iii. Cybersecurity
 - iv. Diversity, Equity, and Inclusion
 - v. HR Administration and Laws
 - vi. Manager and Supervisor Skills
 - vii. Public Safety
 - viii. Risk Management
 - ix. Workplace Safety
 - x. Wellness

The system must be fully brandable as a CIS product and available on demand to member organizations whose technical environments range from highly sophisticated to extremely limited. The LMS must provide a consistent and intuitive learner experience across varying levels of technical capability.

The LMS must support mastery-based learning approaches, particularly for required and compliance driven training. The platform should include robust assessment tools, configurable passing thresholds, retake logic, certifications, expirations, and automated retraining assignments, along with advanced reporting to support regulatory, audit, and risk management use cases.

CIS' implementation plan specifies having the product in place for roll-out to our membership by **August 2026**.

Audience:

CIS has 15K+ active users enrolled in the LMS we are currently using, with an average of 2,514 courses completed per month. These users include CIS staff as well as all levels of employees (executives, managers, supervisors, and line staff) of CIS members. We have 740+ third-party courses and 240+ internal courses in our current LMS. Learners enroll in approximately 270 of those courses each month with an average of 9 learners per course. We expect enrollment and activity to increase over time. The level of technical

competence and breadth of training varies from member to member and individual to individual.

CIS member employees work in many functional areas, such as office administration, finance, public works, human resources, utilities, law enforcement, risk management, and public safety – all with a government focus.

III. SCHEDULE AND SUBMITTAL

A. RFP AND EVALUATION SCHEDULE

Issuance of RFP	January 26, 2026
Deadline to Submit Written Questions about the RFP	February 6, 2026, 5:00 p.m. (PT)
Proposal Due Date	March 2, 2026, 5:00 p.m. (PT)
Evaluation of Proposals, Finalists Selected	March 3 to March 20, 2026
Finalist Interviews and Demos	March 30 to April 17, 2026
Successful Proposer Selected	June 1, 2026
Anticipated Commencement of Contract	June 5, 2026
Internal Implementation, Configuration, Data Transfer, and Testing	June – July 31, 2026
Extended Enterprise Rollout Launch	August 3, 2026

B. CIS CONTACT PERSON

Tila Maceira-Klever
Learning & Development Manager
Email: tila@cisoregon.org

C. WRITTEN QUESTIONS

If proposers have questions about the RFP, they are encouraged to submit them as soon as possible, but no later than **5:00 p.m. (PT) on February 6, 2026**. Questions must be in writing and must be e-mailed to the contact person above. CIS will not be obligated to answer any questions received after the deadline, or any questions submitted in a manner other than as instructed above.

D. PROPOSAL SUBMITTAL

1. General

Proposals must be received by **5:00 p.m. (PT) on March 2, 2026**. Any proposal received after this date and time will not be considered.

Delivery of proposals by the specified deadline is the sole responsibility of the Proposer. CIS will not be responsible for, nor accept as a valid excuse, any delay in delivery except where it can be established that CIS was the sole cause of the late receipt.

2. Method of Submittal

The proposal must be submitted in electronic form in an email to the [Contact Person](#) in Section III.B above.

3. Interviews

If interviews of finalists are needed, they will be virtual and will occur on or about March 30 to April 17, 2026.

4. Evaluation Criteria

All proposals received in accordance with these RFP instructions will be evaluated to determine if they are complete and meet the requirements specified in this RFP. An award will be made to the Proposer whose offer is judged to be the most advantageous to CIS, although CIS expressly reserves the right to reject all proposals and make no award under this RFP.

The following criteria will be considered in evaluating the proposals:

- Quality of the proposal, including an expressed understanding of CIS' requirements;
- Qualifications;
- Demonstrated success implementing the proposed system in a multiple employer environment similar to CIS' extended enterprise;
- References;
- Results of requested virtual demonstrations and presentations;
- Results of CIS and member access to sandbox demonstration sites;
- Flexibility, functionality, and ease of use of LMS;
- Quality, relevance, and governance of off-the-shelf content offerings;
- Data migration approach and risk mitigation strategy;
- Extended enterprise and multi-tenant administrative capabilities;
- Staffing & project organization;
- Ease of implementation plan and support;
- Vendor support, responsiveness, and follow-up;

- Cost schedule;
- Miscellaneous, including exceptions/deviations.

IV. GENERAL INSTRUCTIONS

A. ORAL COMMUNICATIONS

Any oral communication by CIS' contact person(s) or designee concerning this RFP is not binding and shall in no way modify the RFP or the obligations of CIS, a proposer, or selected firm(s).

B. CHANGES TO RFP

If it is necessary to make material changes to the RFP, CIS will e-mail written RFP addenda to all recipients of record of the original RFP and post such addenda on CIS' website (www.cisoregon.org/about/rfs). Recipients of record are those parties to whom CIS directly sent a copy of the RFP. Responses to written questions received by the specified deadline will be incorporated in an RFP addendum.

It is the responsibility of the Proposer to inquire of CIS as to any addenda issued. This may be done by calling the contact person prior to the proposal submittal deadline. All addenda issued shall become part of the RFP.

C. EXCEPTIONS / DEVIATIONS

Any exceptions to or deviations from the requirements set forth in this RFP, must be declared in the proposal submitted by the Proposer. Such exceptions or deviations must be segregated as a separate element of the proposal under the heading "Exceptions and Deviations."

D. AUTHORIZATION TO DO BUSINESS

The Proposer must be authorized to do business in the State of Oregon and in the local jurisdiction in which it is located or where the work will be performed.

E. PRE-CONTRACTUAL EXPENSES

CIS shall not be liable for pre-contractual expenses incurred by a proposer in the preparation of its proposal and proposers shall not include any such expenses in their offers. Pre-contractual expenses are defined as expenses incurred by the Proposer to: (1) prepare and submit its proposal to CIS; (2) negotiate with CIS on any matters related to this RFP; and (3) any other expenses incurred by the Proposer prior to the date of award, if any.

Issuance of this RFP and receipt of proposals does not commit CIS to award a contract. CIS reserves the right to postpone the award for its own convenience, to accept or reject any or all proposals received in response to this RFP, to negotiate with more than one proposer simultaneously, or to cancel all or part of this RFP.

F. WITHDRAWAL; PROPOSAL IRREVOCABLE FOR 120 DAYS

A Proposer may withdraw its proposal at any time prior to the submittal deadline by sending CIS a request in writing from the same person who signed the submitted proposal. As of the deadline for submittal, any proposal received by CIS and not withdrawn becomes an irrevocable offer available for acceptance by CIS immediately and for **120 days** thereafter. The Proposer is responsible for the accuracy of the proposal submitted, and no allowance will be made for errors or price increases that the Proposer later alleges are retroactively applicable.

G. DISPOSITION OF PROPOSALS

All materials submitted in response to this RFP become the property of CIS, except for information identified by the Proposer as being proprietary. A blanket statement that all contents of the proposal are proprietary will not be honored by CIS. Please note that as a public entity, CIS is subject to Oregon public records law, which may require the disclosure of information regarding proposals or a subsequent contract.

H. IMMATERIAL DEFECTS IN PROPOSAL

CIS may waive any immaterial deviation or defect in a proposal. CIS' waiver shall in no way modify the RFP documents or excuse the Proposer from full compliance with the RFP if awarded the contract.

I. WRITTEN AGREEMENT

The Proposer selected for contract award through this RFP shall be required to enter into a written agreement with CIS governing the provision of the LMS platform and off-the-shelf training content, including implementation, hosting, support, and all related professional services. The agreement will also include, to the extent applicable, the provisions described in [Appendix A](#) and any terms or conditions added by addendum. The agreement will clearly define responsibility for content licensing, access, updates, retirements, and substitutions, including any third-party content providers or marketplaces.

It is anticipated that the Proposer may enter into separate agreements with subcontractors to fulfill the terms of this contract. CIS will not be a party to those separate agreements, nor in any fashion a guarantor or indemnitor of them.

J. TERM OF CONTRACT

If a contract is awarded through this RFP, it will be subject to approval by the CIS Board of Trustees or designee. CIS expects the Board will consider the contract on or about May 29, 2026. If approved, the contract will not be effective until it has been signed by both parties. It is anticipated that the initial contract term will be three (3) years. Notwithstanding the initial term, CIS reserves the right, at its sole discretion, to terminate the agreement for convenience at the end of any contract year upon at least thirty (30) days' prior written notice to Contractor, without penalty, early termination fee, or further obligation, except for payment for services properly performed and accepted through the effective date of termination.

K. NEWS RELEASES

News releases pertaining to any award resulting from this RFP may not be issued without the prior written approval of CIS.

V. PROPOSAL FORMAT AND CONTENT

The proposal submitted in response to this RFP must contain the information required in **Sections A through M and Appendix B** below and must address both the LMS platform and the off-the-shelf content solution being proposed. Brevity is preferred. Proposers must clearly distinguish between (1) LMS platform features and services and (2) content library access, licensing, and governance. For the questions in **Sections B through K**, please precede your answers with a restatement of the question. If you intend to use any subcontractors in fulfillment of services, information should be furnished for both your firm and the subcontractors where appropriate.

Submitting general marketing materials about your firm in lieu of providing specific answers to questions will not be acceptable. If you wish to submit marketing materials, you should do so electronically as a separate addendum rather than as part of the formal response.

Proposers selected as finalists may be required to demonstrate their learning management system at a scheduled interview with CIS staff. Proposers must also provide a sandbox demonstration site that CIS staff can access after the interview to evaluate the LMS user interface, administrative features, reporting, and the proposed off-the-shelf content catalog and search experience (including representative course detail pages, previews where available, and assignment/enrollment workflows).

Acronyms and Terms Used in this Section and Appendix B

Acronyms

ADA	Americans with Disabilities Act
CEU	Continuing Education Unit
ILT	Instructor-Led Training (Classroom)
LMS	Learning Management System
LTi	Learning Tools Interoperability
LRS	Learning Record Store
SaaS	Software as a Service
SAML	Security Assertion Markup Language
SCORM	Sharable Content Object Reference Module
SSL	Secure Socket Layer
WCAG	Web Content Accessibility Guidelines
xAPI	Experience API (application programming interface)

Terms

Administrators	Includes CIS “super administrators” in addition to the member admins in the extended enterprise
Class	Logistics of a course including the date, time, location, instructor, and resources
Course	Any type of learning event or object whether it be synchronous, asynchronous, formal (a scheduled class), or informal (on-the-job training)
Entities	The public entities (cities, counties, and other entities) that are CIS members
Entity Admins	Onsite administrators for the entity users; able to view all learning records, manage database, assign learning, and generate reports and certificates for their entity only
Extended Enterprise	Synonymous with “multi-tenant”. It includes CIS member entities, their entity admins, and learners that are external to CIS and our internal staff

A. COVER LETTER

All proposals must include a cover letter addressed to the [Contact Person](#) in Section III.B above. At a minimum, the cover letter must contain the following:

- Identification of the Proposer, including business name, address, and telephone number;

- Name, title, address, telephone number, and e-mail address of a contact person during the period of proposal evaluation;
- Acknowledgment of RFP addenda received, if any;
- A statement that the proposal shall remain valid for a period of not fewer than **120 days** from the due date for proposals;
- Any exceptions to any specified criteria in this RFP;
- Identification of any information contained in the proposal which the Proposer deems to be confidential or proprietary and wishes to be withheld from disclosure. A blanket statement that all contents of the proposal are confidential or proprietary will not be honored by CIS;
- Signature of a person authorized to bind the offering firm to the terms of the proposal.

B. QUALIFICATIONS, RELATED EXPERIENCE AND REFERENCES

1. Furnish background information about your firm, including date of founding, legal form (i.e., sole proprietorship, partnership, LLC, corporation/state of incorporation), locations of corporate headquarters and the primary office that will service CIS, number and locations of any other satellite offices, principal lines of business, number of employees, days/hours of operation, and other pertinent data. Disclose any conditions (e.g., bankruptcy or other financial problems, pending litigation, planned office closures, impending merger) that may affect your ability to perform contractually. Certify that the firm is not debarred, suspended, or otherwise declared ineligible to contract by any federal, state, or local public agency.

If the proposed solution includes off-the-shelf content, identify whether content is produced by your organization, aggregated through partners, provided via marketplace, or delivered through third party licensing arrangements.

2. Describe your firm's experience and qualifications for providing the required services to CIS. Specifically highlight those qualifications that distinguish you from your competitors. The focus should be on recent experience within the last **five years** that is relevant to the scope of work outlined in this RFP.
3. Describe your firm's experience delivering combined LMS and content solutions in extended enterprise environments, including content transition projects from an existing provider such as OpenSesame or equivalent libraries.
4. What is your customer retention rate, and how is this measured?
5. Provide case studies for a maximum of three existing clients that are risk management pools or public entities and include a multi-entity LMS similar to CIS, including details of how your LMS and content ecosystem met their needs, issues

that arose during transition (including content mapping and learner history migration), and how the issues were resolved.

6. Provide references for a maximum of **three** of your current customers, with a preference for clients with extended enterprises similar to CIS.
7. Has your company recently merged with, acquired, or sold to other companies or do you have plans to do so?
8. Do you anticipate any significant changes coming in the next few years that might impact the requirements of this RFP or your ability to meet the obligations if you are awarded the contract?
9. Please describe your company's product development and enhancement process for the solution you are proposing to CIS. Include details about how customer feedback is gathered, evaluated, prioritized, and incorporated into the development cycle. Please also provide your current product roadmap, any sample or historical roadmap documents available, and an explanation of how roadmap items are implemented over time.
10. Based on your understanding of CIS and the scope of work above, what do you anticipate being the biggest challenge for your company if you are awarded the contract? Describe what steps you plan to take to address the challenge.

C. STAFFING AND PROJECT ORGANIZATION

1. Describe the implementation team and include a description of the role each member plays. Include a simple organization chart that clearly delineates communication and reporting relationships among the project staff.
2. Describe the ongoing service team and include a simple organization chart that clearly delineates communication and reporting relationships among the project staff. This question can be skipped if the ongoing service team will be the same as the implementation team.

D. SYSTEM

1. Provide an overview of your system relating to the items described in the scope of work above. If off-the-shelf content is included, describe how the content catalog is presented inside the LMS (native catalog, embedded marketplace, LTI, deep links), and whether learners remain in the LMS experience throughout. You may include screen shots, specification sheets, or other similar information, as appropriate.
2. Describe your system's ability to handle registration of 370+ separate member entities and 15,000+ active users and legacy learner records for an additional 20K accounts.

- 3.** Please describe how your system determines seat counts, including how active, inactive, and legacy learner records are classified for licensing and billing purposes. Explain whether inactive users, historical records, or users with no recent activity consume billable seats, and identify any thresholds, timeframes, or configuration options that affect seat count calculations. Also describe how your company charges for legacy transcript data, historical records retention, and reactivation of inactive user accounts.
- 4.** Describe your system's permission structure with regard to member-entity access, as well as end-user access, to features, content, administrative tools, reporting, etc. At a minimum, your answer should address the following:
 - a.** CIS administrator global access rights;
 - b.** Member-entity level administrator rights;
 - c.** End-user rights;
 - d.** Any security limitations that would enable a member-entity to see another member-entity's uploaded content, group hierarchy, or user data.
 - e.** Any security limitations that would enable member-entity level administrators to edit or create global content or analytic reports.
- 5.** Does your system have a Learning Object Repository that CIS and our members can use to house learning resources to supplement online courses? For example, a member administrator would upload an electronic copy of their anti-harassment policy to assign to all employees along with an online harassment prevention course. If so, describe your repository. At a minimum, include the following:
 - a.** File formats supported (e.g., PDF, Word, Excel, MP4, MPEG, URL etc.);
 - b.** Process for attaching files;
 - c.** Whether multiple files can be attached at one time;
 - d.** Whether user interaction with the file (accessing, viewing, completing, etc.) can be tracked;
 - e.** Any limits for storage size.
- 6.** Describe the process for adding CIS content into your LMS' catalog for use by our learners. Our training modules vary anywhere from 15 to 180 minutes in length. Format of the modules also varies from interactive learning modules to digital video. Include any fees, turnaround times, and limitations on the type, format, or amount of content.
- 7.** What types of course content formats does your LMS support?
- 8.** Describe all content libraries and providers included with or available through your solution (including OpenSesame integration if offered), and explain how each is integrated (native, API, LTI, marketplace, SSO, or other).

9. Does your system include virtual classroom capability and/or a Zoom connector? Please describe in detail how virtual classrooms work (scheduling, launch, attendance, completion tracking, recordings, and reporting) and any additional fees associated with them.
10. What analytics features are built into your LMS? Describe reporting, dashboards, custom report builders, and whether your system includes a Learning Record Store (LRS) or supports xAPI data capture and export. It is important for CIS and its members to measure both utilization and learning outcomes (e.g., assessment results, completions, and training effectiveness indicators).
11. Describe the features of your e Commerce system, including whether it supports invoicing, purchase orders, multi-entity billing, discounts, and export of transaction details. Does it allow for credit card payments via authorize.net? Identify all additional fees associated with this feature. Does it include a guest catalog in which a user can register for a live event without needing an active user account?
12. Does your system allow for separate and distinct home pages for various segments of users? For example, internal vs external, or multiple external.
13. Does your system include a learning request functionality for active users and/or guest catalog viewers? If yes, please describe how this works and if there are any additional fees associated.

E. AI CAPABILITIES & FUNCTIONAL USE

1. Provide a detailed description of all AI-enabled or AI-assisted features included in your LMS (if applicable). Your response should include a bullet-point list for each feature and must identify:
 - a. What the feature does and the problem it is designed to solve;
 - b. Whether the feature is optional, configurable, or can be fully disabled by CIS;
 - c. Whether the feature operates automatically or must be manually activated by an administrator;
 - d. Any required data inputs (e.g., text prompts, learner behavior data, course content);
 - e. Any limitations, dependency requirements, or additional fees associated with the feature.
2. Describe in detail how CIS data is used, stored, processed, and protected by any AI-enabled functionality in your system (if applicable). Your answer must directly address the following:
 - a. Whether any CIS data (including course content, training materials,

metadata, prompts, usage logs, learner records, performance data, or administrative actions) is used to train, improve, or fine-tune your AI models or any third-party AI models;

- b.** Whether CIS data is shared, sold, or made available to third parties for AI model development, enhancement, analytics, or other secondary uses.
- 3.** Describe the governance, risk management, and transparency controls your organization has in place for AI features (if applicable). This should include:
 - a.** Processes for validating AI accuracy, reliability, and bias mitigation;
 - b.** How administrators and end users are informed when content, recommendations, or actions are AI-generated;
 - c.** Safeguards to prevent the generation or display of inaccurate, misleading, or inappropriate AI-generated content;
 - d.** Compliance with relevant regulations and industry frameworks (e.g., NIST AI Risk Management Framework, ISO/IEC AI standards).

F. ADMINISTRATION

- 1.** Describe the administrative features available for managing the user database. Does it include bulk upload/edit options?
- 2.** Describe the process for uploading a course and enabling it to be assigned to users.
- 3.** How have you organized and streamlined the processes for administrators? For example, can an administrator assign a course, attach a document, or send an email to a user from the user's profile page as opposed to only being able to perform each of these functions from their respective feature page? Does your system include any built-in tutorials to step them through a process?

G. IMPLEMENTATION

- 1.** Describe in detail what information, documents, staff assistance, facilities, or other resources you would require from CIS or its members to complete your work; declare any critical assumptions upon which your work plan is based.
- 2.** Describe succinctly how your firm would accomplish the work and satisfy CIS' objectives described in this RFP and the timeline for doing so. If appropriate, divide the work into segments or tasks to represent milestones for measuring progress.
- 3.** Describe your process for scaling up the system as employee participation increases.

4. Describe your process for integrating and validating legacy data from CIS' member database, our current LMS, and our current off-the-shelf content provider (OpenSesame) or equivalent content sources.
 - a. Is your system able to upload transcript history for courses not available in the new content vendor's library?
 - b. Will this transfer include documents from the Learning Object Repository in our current LMS which houses our PowerPoint handouts, Oregon-OSHA documents, member policies, etc.?
 - c. Describe how you will handle content transition and mapping (e.g., course equivalencies, course IDs, retirements, replacements) so that CIS can preserve reporting continuity and historical transcript integrity.
5. Describe the training you will provide to CIS staff, member administrators, and learners upon system launch. How much time is involved in this process? How do you address requests for additional assistance following launch? Are your technicians available for ongoing coaching?
6. What documentation and tutorials do you have available that can be provided to our members for launch? Can they be customized to match the look and feel of our system?

H. REPORTING

1. Please describe how CIS and/or member-employers would access usage, completion, and testing data associated with employee use of the system.
 - a. Describe types of standard reports and the data included.
 - b. Provide examples of standard reports.
2. Can data reports be filtered by user, employer, region, course taken, etc.? Describe.
3. Can the reports be exported to Excel, CSV, PDF, or another electronic format? Describe.
4. Can reports be scheduled to email to CIS or entity admins on a recurring basis?
5. Is access to reporting gated? For example, can access be limited so one employer, department, or employee can't see data for another employer, department, or employee? Describe.
6. Are only pre-defined reports available or can administrators or end-users create their own one-time or recurring reports? Describe.
 - a. Are there webinars or video tutorials to assist end users in creating custom reports?

- b.** What is your process for updating or adding new reports to the pre-defined library of reports?
 - c.** Are there limits to the number of customized reports available?
- 7.** Are there additional fees for requesting new ad hoc reports or recurring reports?
- 8.** Does your system have an API or any web services that allow CIS staff to query the system? Is there a separate fee involved for this feature?
- 9.** If you answered “yes” to the previous question, please describe the current capabilities and what programming language is necessary to access them.
- 10.** Does your system include the ability to track both training taken within the system and external training? What about hands-on training and checklists?
- 11.** If you answered “yes” to the previous question, does your system have an API or web service that allows for attendance at outside training to be imported in? What methods are used to add the completed training – is it learner initiated or can managers and administrators also add it? Can external certificates of completion be uploaded and stored in the learner’s transcript?

I. TECHNICAL REQUIREMENTS

- 1.** Is your system accessible to end users 24/7? If not, please explain.
- 2.** Do you guarantee 100% uptime of your system (not including scheduled upgrades or maintenance)? If not, please explain.
- 3.** Are system upgrades and maintenance performed during non-business hours Pacific Time? If not, please explain.
- 4.** Do you maintain back-up and disaster recovery plans for the system? Please describe the plans.
- 5.** Explain your security protocols for ensuring the protection and privacy of user data.
- 6.** Do you maintain and routinely test security protocols? Please describe your test procedures.
- 7.** Are all systems and processes performed and housed internally? If not, list any outsourced process and/or resources and the vendors that perform them.
- 8.** Describe the minimum system requirements for end users and administrators. Include any specific requirements for hardware, software, Internet connectivity, browser types, plug-ins, etc.

J. MOBILE ACCESS

1. Do you support access to your system via mobile devices (tablets & smartphones) or mobile browser? Describe.
2. Do you have a mobile app? If so, list the platforms you have developed for. (Android OS, iOS, etc.)?
3. Are all features available on the full site also available to end users accessing system via the mobile app? Describe any limitations.
4. Do training modules developed for the full site have to be modified to function in the mobile app?
5. Can CIS or member administrators perform administrative functions via mobile device? If so, describe which functions and any limitations
6. Can the app be branded to CIS for our end users? Describe.

K. CUSTOMER SERVICE

1. What are your hours of technical support? Are they at least from Monday through Friday, 7:00 a.m. to 7:00 p.m. Pacific Time?
2. Is support available to both CIS administrators and our members/end users for both functional and technical support via email or a toll-free telephone number? Please explain.
 - a. Do you have a limit on the number of contacts allowed to submit questions or report system-related issues?
3. Describe your process for administrators to submit technical support questions, and how they will be informed of the timeline for that question to be answered or resolved.
 - a. Describe your process for communicating and responding to any end-user/customer questions or fixing any system-related issues.
 - b. Do you have a system or process for reporting end-user/customer questions and issues addressed to the contracting organization representative? If so, describe.

L. SAMPLE CONTRACT

Submit a copy of your proposed written agreement for the provision of the LMS platform, off-the-shelf content access, implementation, hosting, and ongoing support services to CIS with your response. Required provisions for the agreement are described in [Section IV\(I\)](#) above and [Appendix A](#) below. Pricing should be provided for an initial three (3) year

term, with the understanding that CIS strongly prefers an annual termination right at the end of any contract year without penalty.

M. COST SCHEDULE

Provide a detailed fee schedule of the costs for ALL services that are being proposed, including those below. Priority will be given to proposals that include an annual termination (out) clause allowing CIS to terminate the agreement for convenience at the end of any contract year upon thirty (30) days' written notice, without early termination fees, penalties, or minimum purchase requirements. Pricing should be based upon the following assumptions for the first year of the 3-year agreement:

- Access for a possible 370 member entities with an estimated 16,000 learners/employees.
- Integrating online course content from other third-party vendors.
- 200+ online courses created by CIS in SCORM and integrated into your company's LMS.
- Integrating non-course content such as documents, publications, handouts, videos, etc.

Distinguish between set-up, implementation, and ongoing service fees. Proposers must clearly separate LMS platform fees from content licensing or subscription fees and describe how pricing scales based on users, content volume, or usage. For any service that has multiple cost factors such as materials, labor, travel, etc. provide an itemized breakdown showing the fee for each cost factor and a grand total. If fees are charged by the hour, provide an estimate of the number of hours required.

The schedule should also include the method used to charge for any special requests, reports, or broadening of the scope of work beyond that described in this RFP. This would include the methodology for adding users or content, and for extension of rates in subsequent contract years.

Your cost schedule should be laid out similar to the table below.

Fee Description	Year 1	Year 2	Year 3
LMS Platform Licensing			
Off-the-Shelf Content Access / Subscription			
Annual Maintenance and Support			
Implementation and Training			

Fee Description	Year 1	Year 2	Year 3
Data Migration and Validation			
Custom Report Development (if applicable)			
E-Commerce (if applicable)			
Grand Total			

Optional Services and One-Time Fees

List and describe any fees for one-time or optional services not included in the schedule above. Examples may include:

1. Customizing or co-branding the LMS with CIS' logo and color scheme;
2. Customizing member sites with their logo and color scheme;
3. Customer service options outside of CIS' business hours;
4. Course customization;
5. Features not included in the proposed system, such as gamification or competency/skill management.
6. Virtual classroom functionality or integration with Zoom
7. Content transition and mapping services, including OpenSesame catalog continuity or equivalent course mapping

Description	Amount

APPENDIX A – CIS CONTRACT CONSIDERATIONS

CIS contracts are subject to the following standards. These are not exclusive and other contract clauses and provisions will obviously be applicable as well. However, these are areas respondents to CIS RFPs should be aware of in considering and preparing responses.

A. MANDATORY PROVISIONS:

1. Indemnity Provision. There shall be no provision requiring CIS to indemnify contractor for contractor's acts or omissions. Indemnity provisions should be mutual and reciprocal. Our standard indemnity clause is as follows:

Contractor agrees to hold harmless, indemnify, and defend CIS, and its officers and employee from and against all claims, suits, actions, losses, damages, liabilities, costs, and expenses of any nature resulting from, arising out of, or related to the acts or omissions of Contractor or its officers, employees, subcontractors, or agents in performance of services pursuant to this Contract. CIS agrees to hold harmless, indemnify, and defend Contractor and its officers and employees from and against all claims, suits, actions, losses, damages, liabilities, costs, and expenses of any nature resulting from, arising out of, or related to the acts or omissions of CIS or its officers, employees, subcontractors, or agents pursuant to this Contract.

2. Independent Contractor Status. The following shall be included in CIS contracts:

Contractor shall perform the required services as an independent contractor and not as an "officer, employee, or agent" of CIS as those terms are used in ORS 30.260 through 30.300. Although CIS reserves the right to evaluate the quality of the service provided by Contractor, CIS will not control the means or manner of Contractor's performance.

3. Governing Law and Venue. CIS contracts shall subject to the laws of Oregon and venue for any disputes arising out of the contractual relationship. The contract shall include the following clause or the substantial equivalent:

This contract shall be governed by the laws of the State of Oregon without regard to principles of conflicts of law. Any claim, action, suit or proceeding between CIS and Contractor arising from or related to this contract shall be brought and conducted in the Circuit Court of Marion County for the State of Oregon; provided, however, if a claim must be brought in a federal forum, then it shall be brought in the U.S. District Court for the State of Oregon.

4. Insurance. Except under special circumstances, and with the approval and consent of CIS' Executive Director, the following minimum insurance provisions shall be specified in the contract:

During the term of this contract, Contractor shall maintain in force insurance coverage compliant with the requirements listed below:

- a. **Workers' Compensation insurance in compliance with ORS Chapter 656, if Contractor employs "subject workers".**
- b. **Comprehensive General Liability insurance applicable to the services provided to CIS, with a combined single limit, or the equivalent, of not less than \$2,000,000 each occurrence for Bodily Injury, Personal Injury, and Property Damage, including contractual liability coverage applicable to the indemnity provided under this contract.**
- c. **Automobile Liability insurance applicable to the operation of Contractor's trucks or automobiles with a combined single limit of not less than \$1,000,000 each accident for Bodily Injury and Property Damage, including coverage for owned, non-owned, and hired vehicles, as applicable.**
- d. **Notice of Cancellation or Change. There shall be no cancellation, material change, reduction of limits without 30 days prior written notice from the Contractor or its insurer(s) to CIS.**
- e. **Certificates of Insurance. As evidence of the insurance coverages required by this contract, the Contractor shall provide acceptable insurance certificates to CIS as soon as practicable upon written request by CIS. If requested, complete copies of insurance policies shall be provided to CIS.**

B. OTHER CONTRACT CONSIDERATIONS:

1. Limitations on Liability and Warranties. Responses to RFPs should include a description of any limitations on liability to either CIS or purported third-party liability limitations contractor would propose to include in a contract with CIS. These provisions are disfavored and will be a consideration in our review and comparison of RFP responses.
2. Termination. While termination provisions are negotiable, any provision that would not permit CIS to terminate the contract with a reasonable notice period, without further obligation, would be strongly disfavored and allowed only with the consent of the Executive Director. Our preferred termination provision is as follows:
 - a. **This contract may be terminated at any time by mutual written consent of the Parties.**

- b. CIS may, at its sole discretion, terminate this contract, in whole or in part, upon 30 days written notice to contractor. In the event of such a termination, CIS agrees to pay Contractor the fees and expenses reasonably incurred prior to such termination.**
 - c. CIS may terminate this contract immediately upon notice to Contractor, or at such later date as CIS may establish in such notice, if Contractor commits any material breach or default of any covenant, warranty, obligation or agreement under this contract, or fails to perform in a timely manner the services under this contract, and such breach, default, or failure is not cured within 10 business days after delivery of CIS' notice, or such longer period as CIS may specify in such notice.**
 - d. Contractor may terminate this contract upon 10 days' written notice to CIS if CIS fails to pay Contractor pursuant to the terms of this contract and CIS fails to cure within 30 days after receipt of Contractor's written notice, or such longer period as Contractor may specify in such notice.**
- 3. Dispute Resolution. Mandatory arbitration provisions are disfavored. Our position is that alternative dispute resolution is encouraged, but arbitration should be undertaken only when both parties agree to it at the time of the dispute. If arbitration is undertaken, we would not consent to the rules and procedures of the American Arbitration Association. Other standard rules are available, or the parties can simply agree to rules and procedures as they deem appropriate. Provisions requiring mediation as a precedent to other legal action are acceptable.

APPENDIX B – FEATURES & FUNCTIONALITY WORKBOOK

You must complete the “APPENDIX B – FEATURES & FUNCTIONALITY WORKBOOK.xlsx” workbook and include it with your proposal. The workbook is posted, along with this RFP document on CIS’ website at www.cisoregon.org/about/rfs.

Items in the workbook that your LMS cannot provide or that will not function as requested by the implementation date will not automatically disqualify you from consideration but must be so noted in the “Vendor Comments” section of the workbook with a comprehensive, but brief explanation.

APPENDIX C – LMS HIERARCHY STRUCTURE

Below is a graphical representation of how CIS member-entities and their learners/employees will be set up in the LMS. CIS staff will have administrative access to everything in the LMS, including all members, their learners, records, resources, and content. The dark lines between members illustrate CIS' requirement that members be **completely separate** from each other. In other words, member employees, including entity administrators, should not be able to access any other member's learners, records, resources, or content.

Though not shown in the graphic, CIS staff will also administer the entire course catalog and control access to it. The catalog will be organized by categories and member access to categories will be based on factors such as lines of coverage they have with CIS. For example, a member that has CIS Benefits coverage will have access to Wellness courses in the catalog. It's essential that the members be able to add, edit, and work with their own content, while not having access to add or edit the central CIS content.

