ATTACHMENT ONE: QUESTIONAIRE

    I.   GENERAL

General Information	Vendor Response
Company name	
Address	
City, State, Country	
Telephone number	
Website URL	
Response submitted by:	
Response questions directed to:	
Contact email address	
Do you have an established relationship with anyone else at our company? If yes, who?	
Are you eligible to do business with the state of Ohio?	
Install Base	**Vendor Response**
What is the total size of your install base?	
What is your largest instance by student or by course count?	
Please provide white papers, case studies or examples of how your product has been deployed in a similar context to ours.	
Provide 3 references to active clients most similar to our use case and size.	

    II.   STRATEGY AND ROADMAP

Strategy	Vendor Response
Who are partners you recommend we connect with in order to expand/improve functionality based on our functional requirements?	
Who are resellers or is your company the only source to purchase?	
List all partners you have an integration with.	
Who does your company view as your top competitor? How are you differentiating yourself?	
Do you allow your customers to provide input on products or services? If yes, how? Example (Customer Advisory Board)	

    III.   FUNCTIONAL

Registration	Vendor Response
Can you schedule a variety of learning activities, in addition to formal classroom instructions (for example, on-the-job training and e-learning)?	
Can the platform send automated notifications via email to managers and learners when registering for learning events	
Can you create business rules in the platform for courseware access and enrollment? If yes, describe it in detail.	
Does the platform send confirmations and cancellations?	
Does the platform send pre-event reminder notifications?	
Does the platform allow you to set registration open/close dates?	
Can registration be configured to support leader approval?	
Does the platform support waitlisting and can it track status?	
Does the platform allow for individual and batch enrollment?	
Does the platform support prerequisite requirements prior to registration?	
Does the platform integrate with calendar platforms? If so, what ones are supported?	

Assessment, certification, badges	Vendor Response
Can you create tests, exercises and surveys from Q&A pools within the platform?	
Can assessments be stand alone, included with a course, or included with a learning path?	
When creating an assessment, can you set parameters (duration, attempts, passing score, etc.)? Please describe it in detail.	
What assessment question formats are available (matching, multiple choice, true/false, etc.)?	
Does the platform support formative assessments that allow learners to test out of courses?	
What reporting functionality/dashboards are available for assessments?	
Does the platform support e-signature?	
Does the platform have gamification elements? If yes, describe how it works.	
Can course or learning path descriptions visually showcase included badges or points?	

Can external certifications be imported into the learner's profile?	
Does the platform have specific reports for certification and/or badges?	
Does the platform support badge leveling (beginner, intermediate, expert)? If yes, describe.	
Does the platform integrate with external digital credential vendors (Example: Credly)?	
Can badges or certifications have an expiration date?	
If yes to above, does the platform send reminders to renew certification or badges?	
Can leaders receive notification when a certification or badge is obtained by a team member?	
AI Support	**Vendor Response**
Does the platform use AI for content recommendations or adaptive learning? If yes, explain in detail.	
Can the platform use AI to recommend courses if a learner fails an assessment?	
Does the platform use AI to make recommendations based on learners' role, location, learning preferences, behavior, or what other team members are doing?	
Does the platform use AI for project matching, job matching or opportunity matching?	
Does the platform use AI for networking, coaching, or mentor recommendations?	
Can users opt-out of AI based recommendations and data tracking?	
Search Functionality	**Vendor Response**
Can the search functionality be customized?	
Can users browse content that resides in multiple libraries through one streamlined browse feature, with the ability to sort/filter by a number of variables (role, level of difficulty, source, subject matter, etc.)	
Can content be filtered to show courses that support continuous education credits?	
Does the search functionality have auto-correct and/or autofill? If so, can it be overridden?	
Do search results include paths and journeys?	
Can searches or content be saved/favorited?	
Does the platform have capability to search within a document, course, video, podcast or other medium?	
Can search data be mined and extracted for evaluation?	

Ohio Treasurer of State
Request for Information
LEARNING CMS AND RECORD STORE

Collaborative Learning	Vendor Response
Can users create social profiles?	
Can users search and follow other users' profiles?	
Can users create and share their own content? If yes, what type of content can be created/shared?	
Does the platform have tools to support user generated content?	
Can users comment on courses, paths, or journeys?	
If yes to the above, do users receive points or badges for participating in discussions?	
Can users rate content?	
Can certain roles advertise content or learning events on a learner's dashboard?	
Can users share content with each other?	
Can users create learning communities, groups or cohorts to study together?	
Can admin group learners into groups for the purpose of collaboration?	
Does the platform have the capability to ID or allow flagging of inappropriate or false user generated content?	
Does the platform support forums or discussion boards?	
Does the platform display trending or most popular content? If yes, is this configurable by location?	
Can users live chat with one another in the platform?	
Can the platform integrate with existing software tools, such as workspaces, wikis, and chat programs? If so, what ones?	

Mobile Learning/Accessibility	Vendor Response
Does the platform have responsive design?	
Does mobile content have to be labeled during the upload process or is it auto recognized?	
Are mobile experiences governed by the same security permissions as the desktop platform?	
Does the platform support geo-location to serve up content based on the location of a mobile device?	
Does the platform support beacons?	
Does the mobile web-app/native app support SSO?	
Can content be downloaded on a mobile device for offline completion or reference?	
Does the platform integrate with personal assistants (example; Alexa, Siri, Google, etc.)	
What functionality is not available via mobile device?	

What accessibility functionality is available for mobile devices?	

Content/Authoring	Vendor Response
Does the platform include any training content?	
Does the platform support micro-learning?	
Does the platform provide tools to develop training, including micro learning?	
Does the platform have revision tracking, with notifications if learners need to be retrained or retested?	
Does the platform allow you to create surveys or VILT evaluations?	
Can the platform support events hosting (webinars, VILT, etc.)?	
If yes to the above, does the platform integrate with web conferencing tools like Zoom, Webex, Teams, etc.?	
Does the platform allow you to add skill metadata to custom content?	
Does the platform support live streaming?	
Does the platform have the functionality to record live events and publish as a content object?	
Does the platform have the capability to offer transcription or translation of static content and live streams?	
Does the platform support video creation and curation? Formats?	
Does the platform support podcasting creation and curation? Formats?	
Does the platform support e-learning in compliance with SCORM,, AICC, xAPI, and cmi5?	
Does the platform support VR/AR/MR/XR content formats?	
Does the platform allow for the creation of learning paths or journeys? If yes, what content types are supported/unsupported?	
Does the platform support deep linking to content outside of the platform?	
Does the platform allow you to create course catalogs by domain?	

User Personalization	Vendor Response
Can user landing pages be customized by the user?	
Can a user create their own learning path or journey using courses in the catalog?	

Can users create playlists separate from a structured path or journey?	
Can users customize their preferences (recommendations, notifications, etc.)?	
Can users add content from external sites?	
Can learners add skill or skill gaps to their profile?	
Can leaders or team members endorse skills on another user's profile?	
Can users add learning goals to their profile?	
Can leaders customize learning paths for team member career goals?	
Can users import course completions or certifications in from external training vendors?	
Can users set reminders or deadlines to complete content?	
Reporting & Analytics	**Vendor Response**
What reporting and analytics tools are built into the platform?	
Can the platform support real time reporting?	
Does the platform have planned and ad-hoc reports?	
Please list the reports that come standard with the platform.	
What reporting variables are standard in the platform (completion status, name, location, etc.)?	
Can report creators use filters and sort information to create custom views?	
Does the platform include pre-built dashboards and analytics for executives, managers and administrators?	
If xAPI is supported, what out-of-the box statements are included? Can custom statements be added to capture user interaction within the platform?	
Can the platform restrict access to reports based on role?	
Does your company provide services to develop custom reports? If yes, describe and include pricing models.	
Does the platform integrate with analytics and dashboard providers such as IBM, Microsoft, Oracle, SAP, SAS, etc.?	
Does the platform include survey and evaluation reporting capability?	
Can the platform report on integrated off the shelf content provider completions?	

Can the platform report on open rates, click throughs, or abandon rates?	
Administration	**Vendor Response**
Can admin provision and control non-company employee access to the platform?	
What type(s) of admin roles are available? Please list all roles with available permissions.	
Can you create custom admin roles?	
Does admin complete batch enrollment of learners into a course, path, journey based on a specified data set?	
Can admin add, remove, block or change learners roles?	
Can admin manage the lifecycle of content - create, edit, retire within the platform?	
Does the platform have communication tools that allow admin to send batch messages, email notifications, or chat messages to alert learners about learning events, deadlines or encourage participation?	
Can admin manage instructor workflow within the platform? This includes facilitator calendars/availability, room booking, courseware, assessments, attendance, etc.?	
Does the platform allow you to tag a single learning object to multiple audiences?	
Does the platform have proxy capabilities?	
Can admin mark learning objects complete on behalf of a learner?	
UI/UX	**Vendor Response**
Does the platform comply with WCAG 2.0?	
Can the platform login page and user landing page be branded (colors, logos, and other elements)?	
Can the UI be customized for specific workflows by us or your development team? If by your development team, what is the bill rate?	
What is the company's release cycle for UI/UX updates?	
Can certain elements of the UI be turned off? If so, please describe it in detail.	
Does the platform allow for device switching? Start learning on one device and pick up on another.	
Does the platform support microsites/domains? If yes, is there a limit to the number of microsites/domains?	

Does the platform support responsive web design?	
Does the platform allow learners to take course notes within the platform?	

E-commerce	Vendor Response
Does the platform support e-commerce?	
Does the platform have a payment tracking tool to manage training costs and chargebacks?	

IV.   ARCHITECTURE

Architecture	Vendor Response
Do you support SAAS and/or on prem installations?	
What is your platform architecture? What framework is your application built on?	
What is the total/concurrent user capacity?	
Do you perform regular external audits on your cloud environment? If yes, please share the latest report.	

Hardware/Browser Support	Vendor Response
What web browsers do you support?	
Do you have a native mobile app? If yes, what is the name of it?	
How does the mobile interface differ from the web interface?	
What other applications/hardware can run your platform (example: Apple TV, Firestick, etc.)	

V.   DATA AND SCALE

Scale	Vendor Response
What is the total/concurrent user capacity?	Move to architecture

Uptime and Monitoring	Vendor Response
Do you provide a platform status dashboard?	
Do you have Service Level Agreements (SLA's)? What are they?	
How do you monitor and measure web traffic?	
What percent of the time is the response time within SLA?	
How does your company handle maintenance and upgrades?	
What is your disaster recovery strategy? What are the RPO (recovery point objective) and RTO (recovery time objective) numbers?	

System Data	Vendor Response

What is the maximum volume of data that can be loaded into the platform?	
What is the process for archiving data? How long can it be stored?	
How is data migrated into the platform? What is the expected time frame?	
How is data migrated to and from other LMS's?	
What functionality is available for bulk uploading for content and profiles?	
What format can data be exported in?	
Do you have a built in Learning Record Store (LRS)?	
Can data be pushed to a data warehouse?	
Is there an additional cost for data exportation/extraction?	
Is your skill data exportable?	
Can your skill taxonomies and ontology be modified/exported?	
What platform data cannot be exported?	
What file formats are supported?	
Can data exports be schedule to run automatically?	

VI.   SECURITY

Security Hosting	Vendor Response
What level of security does your host provide?	
Is there a FedRAMP platform available, and if so, what is the current version compared to other platforms?	
Is your security data auditable? If yes, can you share the latest audit report?	
Please provide the latest SOC1, SOC2, and ISO27001 reports.	
What penetration tests are conducted and what is the frequency?	
What is your method of data encryption?	
How do you ensure customer data is segregated?	
Access Controls	**Vendor Response**
Do you have SSO support for Microsoft, or social accounts?	
What roles are available in the platform? Can usage be restricted by role?	
Are roles customizable?	
What controls exist to restrict access to sensitive data?	
Does the platform support remote access?	

Do you support Oauth2.0

Support	Vendor Response
Please list available maintenance and support packages along with cost.	
Please list options and cost of other support personal (admin, developer, etc.).	
What are the help desk support options (email, text, phone, etc.)?	
What are your escalation protocols?	
Do you offer integration support?	
Do you offer success/onboarding support?	
Do you offer migration support?	
Please list all premium support packages along with price.	

VII.   PRICING

Pricing	Vendor Response
What is the initial setup or install fee?	
Are there any other one-time additional fees (Example: Training)?	
Per user price for 5,000 users for 1 year and following years.	
Is pricing different for internal vs external (partner) users? If yes, please provide detail.	
Do you charge a flat fee for total potential users, or do you only charge for active users?	
Please describe any API fees (connections, calls, etc.)	
Please list additional storage fees if we were to exceed capacity.	
How do you handle changes to the subscription during the contract term?	
Please list any other reoccurring fees that are not listed in the pricing models above.	