

**REQUEST for PROPOSAL (RFP)  
RFP No: 2013-091-BS**

**LEARNING MANAGEMENT SYSTEMS AND SERVICES**

**DATE ISSUED: January 31<sup>st</sup>, 2014**

**CLOSING DATE: February 28<sup>th</sup>, 2014**

**CLOSING TIME: 11:00 a.m. EST**

**FORWARD ELECTRONIC PROPOSALS TO:**


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**DEFINITIONS:** The terms used throughout this RFP document shall have the following meanings:

**“Activity Stream”** means a list of recent updates to certain areas of the system, viewed in the LMS or portal;

**“Agreement”** for the purpose of this RFP, means the formal written document that shall be executed by both RU and the Successful Supplier for the provision(s) of the Deliverables as described therein;

**“API”** means Application Programming Interface;

**“Award”** means the notification to a Supplier of acceptance of a Proposal or quotation that brings an Agreement into existence;

**"Business Day"** means any working day, Monday to Friday inclusive, but excluding statutory and other holidays, namely: New Year's Day; Family Day; Good Friday; Victoria Day; Canada Day; Civic Holiday; Labour Day; Thanksgiving Day; Christmas Day; Boxing Day and any other day which RU has elected to be closed for business;

**“Business Hours”** means 9:00 a.m. to 5:00 p.m. local time of any Business Day;

**“Client”** means Ryerson University;

**“Closing Date and Time”** means the date and time of day on which Proposals must be submitted to RU in order to qualify for evaluation;

**“Conflict of Interest”** means in relation to the RFP process, to identify any Supplier who has an unfair advantage or engages in conduct, directly or indirectly, and as a mandatory requirement for each Proposal;

**“Contact”** means RU’s secure e-mail address for all related correspondence to this RFP;

**“Course Section / Section Number”** means a group of students enrolled in the course as defined by the registrar. A course may be made up of more than one "section." Each section has a number. A course shell may contain students from more than one section;


**“Deliverables”** means the goods and/or services as described herein;

**“EFT”** means Electronic Funds Transfer;

**“End User”** means and represents members of the RU community that have accounts on RU's current systems (Students, Faculty & Staff would be included);

**“Evaluation Matrix”** means a tool allowing the evaluation team to score Supplier proposals based on multiple pre-defined evaluation criteria;

**“FOB”** means Free or Freight on Board (FOB) Destination means shipper bears cost and risks associated with transportation, up to and including the offloading of the goods to the location/dock;

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**“Group”** For the purpose of this document, the term 'group' will refer to the Groups tool within the LMS;

**“IMS”** means Instructional Management Systems; an organization that develops standards for interoperability and adoption practice standards for distributed learning;

**“Integration”** When we refer to integration, we refer to interoperability beyond Single Sign On (SSO) such as authentication, authorization, groups/user management, export of grades to a student administration system and so on;

**“Instructors”** For the purpose of this document, the term Instructors will refer to any of the course administrators. We expect that assignment of functions to certain course roles can be done in the System Admin;

**“LMS”** means Learning Management Systems;

**“Mandatory Requirements”** means that failure to meet or fulfill one of these requirements will result in the disqualification of the proposal from further review;

**“Notifications”** means Email, SMS, or some other form of message sent to user when a specified action (such as new content, new announcement, new discussion post) occurs;

**“OHST” or “HST”** means Ontario Harmonized Sales Tax and may be referred to as HST;

**“Privacy By Design”** is a standard that Ryerson is committed to implementing as our preferred mechanism for ensuring compliance with privacy legislation  
<http://www.privacybydesign.ca/index.php/about-pbd/7-foundational-principles/>

**“Proposal”** means the Supplier’s written response to the RFP document;

**“RFP”** means this Request for Proposal document;

**“RMS”** means Ryerson’s home-grown identity management system that manages both identities as well as manages resources.


**“RU”** means Ryerson University;

**“SAS”** means Ryerson’s Student Administration System (PeopleSoft);

**“Shell / Course Shell / Organization”** A "shell" is the space in which materials and tools can be distributed to a specified group of people. A "course shell" is used specifically for courses, while an "organization" or "organization shell" can be used for a variety of uses (departmental, project/research-based, program);


**“Successful Supplier”** means the preferred Supplier(s), if any, who are bound by the Agreement to provide the goods and/or services as described herein;

**“Supplier”** means a legal entity that submits or intends to submit a Proposal in response to this RFP;

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**“System Administrator”** means multiple employees of Ryerson University (for example, Computing and Communications Services employees) responsible for administering the LMS and has access to administrative interfaces of the system;

**“WSIA”** means Workplace Safety and Insurance Act.

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## 1. INTRODUCTION, BACKGROUND AND PROJECT OVERVIEW

### 1.1 Objective

This Request for Proposal (“RFP”) is an invitation to prospective Suppliers to submit Proposals for Learning Management Systems and Services for Ryerson University as further described in Part 2 – Deliverables.

The objective of this RFP is to Award and execute an Agreement (attached as a Sample Agreement, Appendix ‘D’) for the Deliverables as described herein with a Successful Supplier.

### 1.2 About Ryerson University

Ryerson is Canada's leader in innovative, career-focused education and a university clearly on the move. It is a distinctly urban university with a focus on innovation and entrepreneurship. Ryerson has a mission to serve societal need and a long-standing commitment to engaging its community.

Guided by a bold Academic Plan, an ambitious research agenda, and a Master Plan to revitalize the campus and surrounding neighbourhood, Ryerson is the most applied-to university in Ontario relative to available spaces, and its reputation with business and community leaders continues to rise.

Ryerson offers more than 100 undergraduate and graduate programs. Culturally diverse and inclusive, the university is home to 29,200 Undergrad Students, 2350 Master's and PhD students, and 7,403 Continuing Education Students. The FTE for Student Enrolment is 30,400. There are 2,300 master's and PhD students, nearly 2,700 faculty and staff, and more than 140,000 alumni worldwide. Research at Ryerson is on a trajectory of success and growth: externally funded research has doubled in the past four years. The G. Raymond Chang School of Continuing Education is Canada's leading provider of university-based adult education with approximately 70,000 annual enrolments in its online and part-time courses and programs. The university's focus on innovation and entrepreneurship is represented most distinctly by the Digital Media Zone, a place for students to collaborate and bring their digital ideas to the marketplace.


Ryerson is reshaping the downtown core of Toronto with three new buildings: the Ryerson Athletics Centre at the Gardens, the Ryerson Gallery and Research Centre in the heart of campus, and a Student Learning Centre on the site of the iconic Sam the Record Man property on Yonge Street. In addition, a Health Sciences building is in the planning stages.

For more information, visit [www.ryerson.ca](http://www.ryerson.ca).

### 1.3 Mission

The special mission of Ryerson University is the advancement of applied knowledge and research to address societal need, and the provision of programs of study that provide a balance between theory and application and that prepare students for careers in professional and quasi-professional fields.

As a leading centre for applied education, Ryerson University is recognized for the excellence of its teaching, the relevance of its curriculum, the success of its students in achieving their academic and career objectives, the quality of its scholarship, research and creative activity and its commitment to accessibility, lifelong learning, and involvement in the broader community.

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## 1.4 Background and Project Overview

Over 76% of RU's course offerings have an online component and over 400 courses are offered entirely online via the Chang School. RU recently adopted Google Apps for Education for its students, Instructors and staff.

RU currently provides the Blackboard Learning Management System, Adobe Connect, Rycast for online video delivery, Google Apps for Education, and other services to support courses ranging in format from lecture/lab, hybrid, to purely online. RU is seeking to update and enhance the e-learning systems and services it makes available to the RU community during a period of fiscal restraint. RU's Computing and Communications Services (CCS) and RU's Advisory Committee on Academic Computing (ACAC) are leading the renewal effort. RU is considering replacing Blackboard Learn version 9.1.8 with a different Learning Management System (LMS) and is also interested in receiving proposals that include additional third party modules, systems, or services that enhance or complement the LMS and RU's use of Google Apps for Education.


Many academic programs at RU have required their students to use professional and specialized computing tools in courses. The range of applications required by the curriculum is extensive. It includes statistics packages, software development tools, video-editing software, Computer Aided Engineering systems, Geographic Information Systems, and many more. RU students make extensive use of Web and mobile applications for social interactions including audio and video calls, real-time messaging, Email, and text conversations in various forms. They also do academic work using Web and mobile tools ranging from searching the Web to collaborative writing environments and file sharing systems. Just as students often expect to use software tools commonly used in industry they often expect to use popular online tools at RU. Instructors and staff have similar expectations.

As an innovative and community-engaged University, RU is seeking e-learning systems and services which will enable it to support key priorities identified in the [Academic Plan \(2008-2013\)](#):

1. High quality, societal relevant undergraduate and graduate programs
2. Student engagement and success
3. Learning and teaching excellence
4. Scholarly, research and creative intensity
5. Reputation

RU has a broad and diverse community. Each academic area has different but significantly overlapping Information Technology (IT) requirements when it comes to course delivery and e-learning. It is not possible to predict all the ways the community will use a learning management platform with a broad range of services and features that are beyond what RU offers today. Thus, the goal of providing a new set of rich services is to provide an enabling and nimble infrastructure that individuals, programs, departments, and RU as a whole can use within a structure of effective cost containment.

It is particularly important to make available systems and services equivalent to a modern LMS platform that everyone can use in ways that are appropriate for them. For example, Instructors and students with minimal computing experience should be able to do basic things online with a minimum of fuss while advanced users can fully exploit sophisticated features such as selective release of adaptive coursework and advanced engagement and


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learning analytics. Furthermore RU’s developers should be able to safely customize the system as required to provide features such as custom document-centric peer review course workflows. Deep, flexible, and secure integration with Google Apps for Education is required for Instructors and students who choose to leverage Google Apps in their courses. Close integration with other services such as Ryecast is also required. RU’s always growing investment in e-learning makes it essential that every system be robust, secure, and *highly* scalable with excellent performance characteristics when accessed on mobile and more traditional computing devices.

E-Learning systems and services frequently provide the capacity to collect, use, retain and share personal information about students, Instructors, staff or highly confidential research subject information. Personal employee and student information is considered to be sensitive and carries with it specific risks of harm to those whom it relates including the possibility of reputational harm, identity theft or fraud. Furthermore, as a publicly-funded institution in Ontario, RU has specific legal obligations regarding the access to and protection of personal information as specified under the Freedom of Information and Protection of Privacy Act (FIPPA), which the university has also outlined in its Information Protection and Access Policy and Personal Information Protection and Electronic Documents Act (PIPEDA). Any decision relating to computing and collaboration services must therefore take into account RU's responsibilities to protect personal information.

RU is very interested in carefully considering both externally and locally hosted options as well as proprietary and open-source systems and services.



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## 2. DELIVERABLES

### 2.1 No Guarantee of Volume of Work or Exclusivity of Agreement

RU makes no guarantee of the value or volume of work to be assigned to the Successful Supplier. The Agreement executed with the Successful Supplier will not be an exclusive Agreement for the provision of the described Deliverables. RU may enter into an Agreement with others for the same or similar Deliverables to those described in this RFP or may obtain the same or similar Deliverables internally.

### 2.2 Project Purpose, Process and Existing Systems and Services

Ryerson University is seeking to renew and enhance the e-learning systems and services it makes available to all of our students, Instructors and staff.

Specifically, we are looking for a more capable LMS than the current version of Blackboard Learn Release 9.1.8 we are using. We are also interested in considering other tools or systems that may add capacity not readily available in an LMS or Google Apps for Education. We have a strong interest in evaluating cloud vs. locally hosted options and open source vs. proprietary solutions. However, any new systems must offer:


- ease of use
- full support for mobile devices including iOS and Android based tablets and smartphones;
- full support for all modern browsers such as Chrome and Firefox running on multiple operating systems
- e-text book and course plugin capacity
- seamless scalability from small courses of a few students to massive courses
- learning analytics
- social networking and sharing
- excellent accessibility - must not break screen readers on multiple platforms
- effective and easy-to-use management of multiple sections within a single course shell or similar way to manage multiple course sections.
- excellent performance and the ability to massively scale courses as needed
- ability to leverage tools in our existing environment or proposed superior tools.

This Request for Proposal (RFP) is directed to innovative, solution-oriented suppliers who can offer a secure and privacy-conscious environment to our end-users.

### 2.3 Process

This RFP process includes a pre-selection step where no more than four (4) LMS systems will be selected by the review committee as part of a short list. Other third party systems or service add ons to the LMS *may* be proposed. In addition to being part of the evaluation for this RFP, the Demonstration Course ( as outlined and created in Section 2.6.7) for those selected shortlisted product(s), will be provided to the RU community for further review and community feedback. While the committee has a strong interest in ensuring the pre-selected products include locally and externally hosted options as well as open source and proprietary options, the demonstration course will not be locally hosted. Systems that cannot be made available to everyone in the RU community who is interested will not be selected.

When the community review of the shortlisted product(s) is complete the committee will evaluate feedback from the community along with their initial evaluation and make a final selection.

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## 2.4 Ryerson's Current Learning Management and Related Systems and Services

RU's central IT department: Computing and Communications Services currently hosts and administers Learning Management System: Blackboard Learn Release 9.1.8 (Service Pack 8)

Other systems currently being used for learning support at RU are:

- 1. Plagiarism detection software: Turnitin; integrated with the LMS using Blackboard building block v.2.5.25
- 2. Library e-Reserve: ARES v 4.3 (as of December 16, 2013); integrated with the LMS using Blackboard building block v.2.6.1
- 3. Student response system (clickers): iClicker v6.3.1 and iClicker GO; integrated with the LMS using iClicker Integrate for Blackboard Learn v5.2.5
- 4. Web conferencing/virtual classroom: Adobe Connect v.8; LDAP authentication, not integrated with the LMS
- 5. Video Conferencing platform: Cisco (formerly Tandberg) and Cisco software solution "Jabber" Client v.4.7 (formerly "Movi");
- 6. Online streaming video (live and on-demand): Ryecast (D2L Capture); LDAP authentication, not integrated with the LMS
- 7. Online test proctoring/controlling: Respondus Lockdown Browser; integrated with the LMS using Blackboard building block v3.0.9
- 8. Blogging: Wordpress v.3.8; LDAP authentication, not integrated with the LMS
- 9. Document collaboration:
  - a. Confluence v 3.5.17; CAS authentication, not integrated with the LMS
  - b. Google Docs; CAS authentication, not integrated with the LMS
- 10. Online survey: Opinio v.6.4.4 rev 6111; LDAP authentication, not integrated with the LMS
- 11. Test response system: Scantron; results can be uploaded into the LMS gradebook
- 12. Publisher content and assessment:
  - McGraw-Hill Connect; integrated with the LMS using Blackboard building block v. 2.1.918
  - a. WileyPLUS; integrated with the LMS using Blackboard building block v.2.0.918
  - b. Nelson WebAssign; integrated with the LMS using Blackboard building block v.2.1.3


### ➤ *Current Capacity*

RU's current use of BlackBoard is as follows: our Fall 2013 term had 2,854 course shells. We have a 400 GB database and 3.5 TB of content. Larger class sizes may reach 5,000 active students and non-course organizations that contain 50,000 users. Any future LMS we consider would need to be able to accommodate our current capacity as well as be scalable to accommodate our future growth.

### ➤ *Hardware*

To host and run our current version of Blackboard for the course capacity listed above, we utilize the following:

- 9 Dell M620 production servers running Linux Redhat, 64GB RAM except DB server with 128GB RAM :
  - 5 app. servers load balanced for end user's access,
  - 2 servers for uportal web services plus backend jobs running
  - 1 content file server
  - 1 Database server running Oracle 11g

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## 2.5 Company Market Space, Presence, Reputation, Stability and Value-Added Benefits

RU is seeking a Supplier that can demonstrate its leadership, experience and stability. The Successful Supplier must be able to demonstrate its expertise in working with higher-education environments and to show the potential fit as a Successful Supplier both now and into the future.

- 1) Suppliers should provide evidence of their financial viability through financial statements or other means. Where open source systems are proposed some effort must be made to show the size and level of commitment of the development community.
- 2) Suppliers should provide a description of their company, including history, and market share or role in the learning management space.
- 3) Suppliers should outline their capability to provide guidance, recommendations, training and assistance in the process of migrating to a new learning management system for end users as well as to RU's system administrators and technical staff.
- 4) Suppliers are requested to provide a Supplier profile and a product roadmap of their technologies including evidence of where the Supplier sits on the Gartner Magic Quadrant by providing reports if applicable.
- 5) Identify the most significant advantages to RU, by selecting your company as a Successful Supplier and your proposed solution.
- 6) Detail your organization's structure that addresses the unique requirements of education, list conferences your organization attends/sponsors that are higher learning focused, memberships in higher learning associations and other University accounts that you currently service.
- 7) Suppliers are required to provide three (3) customer references. All must be higher education references, and preferably based in Canada. Including the Institution name, number of active accounts, a contact at the Institution and the components of that system that are in use if different than what you propose to RU.

## 2.6 Requirements and Specifications

**Instructions:** The following requirements list should be answered with a Yes or No indicating if your LMS has the listed feature, with the opportunity to provide further details where needed for any of the questions. In the case where a Yes/No answer is not applicable, the field has been greyed out and marked "N/A". Please use the Details column to answer the question.

In the Y/N column, RU is asking solely about the functionality in the core LMS product. Only answer "Yes" if the functionality is available in the core product offering. You can use the "Further Details" column to explain if the functionality is achieved with 3rd party add-ons.

**Note:** \* asterisks denote requirements that are mandatory of the LMS

## 2.6.1 Functional Requirements

### 1. Course Level Tools

#### 1.1 Discussions

Req #	Requirement	Y/N	Further Details?
1.1	Discussions - Relates to tools that support discussion in the system, their interface features, configuration and assessment options		
1.1.1	* Provides capabilities for threaded discussions		
1.1.2	* Threaded discussions have useful visual cues (i.e. indenting replies, ability to expand/collapse if needed)		
1.1.3	* Provide discussion board functionality for subgroups of course users, to be managed or initiated by group members.		
1.1.4	Data on the total number of posts and replies made by a student is available to the instructor		
1.1.5	Instructor has the option to see all the postings made by one student together in one location for comparison and grading.		
1.1.6	Ability to copy Discussion Boards (without message posts) from course to course, for reuse.		
1.1.7	Provide capability to have private discussions that cannot be viewed by the instructor (instructor initiated.)		
1.1.8	* Ability to attach documents to discussions in discussion forums.		
1.1.9	Provide users the option to share a Google Doc when inserting a link into a discussion.		
1.1.10	Provide the ability to moderate forums.		
1.1.11	Provide the ability to delegate moderation of individual forums		
1.1.12	* Provide discussion forums that are searchable (in one or all forums in a course)		
1.1.13	Allow instructor to block specific users from posting or viewing certain forums		
1.1.14	* Ability to quickly find (isolate) new posts, and new responses (in one or all forums in a course.)		
1.1.15	* Ability for the instructor to control permissions for users within the discussion, whether students can create new discussion forums and threads.		
1.1.16	* Ability for the instructor to lock forums or threads so that users can no longer continue posting to them (but can still view existing posts.)		
1.1.17	Allow instructor to choose whether anonymous messages are permitted, on individual forums.		
1.1.18	Provide users ability to flag/tag posts for their personal use, filter and sort posts.		
1.1.19	* Ability to mark posts as read/unread.		
1.1.20	Have users' own messages automatically marked as 'read' in their view.		
1.1.21	Instructors can give students the right to delete or edit their messages.		


1.1.22	Ability for Instructors to grade students on their posts in forums or threads		
1.1.23	In the case that Instructor has allowed editing of messages, editing is NOT permitted once a grade has been submitted (in a graded forum or thread).		
1.1.24	Discussion Messages can be exported in other document formats (state which.)		
1.1.25	Instructors can move or copy messages between Forums.		
1.1.26	Course participants can choose to be notified via email (subscription) when a new message has been posted.		
1.1.27	Notifications should be configurable for specific parts of a course (entire discussion board, subscribed threads within a discussion board, responses to a user's posts, etc...)		
1.1.28	Ability to put conditions on student's ability to post in a forum. (refer to the adaptive release section #4.2.22)		
1.1.29	Ability to allow recording of audio and video directly from the participant's computer microphone or webcam to be included instantly within a discussion forum post. Enabled/disabled at the instructor's discretion.		

## 1.2 Announcements

Req #	Requirement	Y/N	Further Details?
1.2	<b>Announcements</b>		
1.2.1	*Ability to edit announcement (even after it has been posted)		
1.2.2	* Ability to delete announcement (even after it has been posted)		
1.2.3	Ability to schedule announcements for release.		
1.2.4	Ability to trigger emails to be sent to all active users (i.e. not dropped students) only when the course is available.		
1.2.5	Ability to post an announcement via mobile app.		
1.2.6	Ability to post an announcement by sending an email.		
1.2.7	Ability to lock certain announcements to remain at the top.		
1.2.8	Ability for POSTER to mark certain announcements as "Important" or "High Priority" with a visual queue. (These marks are visible to ALL)		
1.2.9	Ability for VIEWER to mark certain announcements as "Important" or "High Priority" with a visual queue. (These marks are not visible to others.)		
1.2.10	Ability for viewer to view a list of their personally-marked announcements.		
1.2.11	Only Instructor may control the order of the announcements.		
1.2.12	Allow the copying of announcements to new courses.		
1.2.13	Permit Instructor to trigger an announcement from other tools (i.e. when adding new content item, when test or assignment is released, etc.)		

### 1.3 Groups

Req #	Requirement	Y/N	Further Details?
1.3	<b>Groups Tool</b>		
1.3.1	* Instructor can manually add group members from course membership.		
1.3.2	Instructor can allow students to self-enroll in predefined groups, where group size may be restricted.		
1.3.3	* Instructor can instruct the tool to randomly add group members based on criteria (i.e. determine the number of groups, or number of members in each group.)		
1.3.4	* Instructor can create a number of groups based on the same criteria.		
1.3.5	Ability for instructor to, at a glance, view group membership (count) by group.		
1.3.6	Ability for instructor to, at a glance, view a list of students to see which groups they are enrolled in.		
1.3.7	Ability for Instructors to create a set of self-enroll groups, from which a student may only self-enroll in one.		
1.3.8	Ability for instructor to determine whether students are allowed to leave a group and join another, in the case of self-enroll groups.		
1.3.9	Sign-up sheets (for groups, topics, presentation time, etc.) as a means of joining a self-enroll group.		
1.3.10	Provide private group versions of any collaborative and communication tools (i.e. *email, *discussion, virtual meeting, wiki, blog)		
1.3.11	Ability for group members to exchange files through the proposed system.		
1.3.12	Dynamic group membership based on section number.		
1.3.13	Dynamic group membership based on other criteria. Elaborate in the details		
1.3.14	Ability for instructor to control the visibility of the group membership to the entire course.		
1.3.15	Smart management of users, e.g. handles students who dropped and registered late as they come, does not include dropped students. Ability to email/notify instructor when group members drop the course		
1.3.16	Subgroups of groups can be created.		
1.3.17	Course content and tools can be easily assigned to groups, and can be customized for each group (e.g., different due dates on assignments.)		
1.3.18	Ability to assign a folder in Google Docs for the use of the group members, not visible to other students in the course shell.		
1.3.19	Ability, for group members, to share their work with the entire class.		
1.3.20	Provide the capability for student group activities (discussions, etc.) to be private (not viewable by the instructor - instructor initiated.)		

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#### 1.4 Email

Req #	Requirement	Y/N	Further Details?
1.4	<b>Email Tool (system interface for sending email)</b>		
1.4.1	* Ability for Instructor to send an email to the email accounts of any/all users in the course shell (based on shell membership).		
1.4.2	The instructor should always have a way to refer to the full list of recipients on sent emails.		
1.4.3	Any user sending an email should receive a copy in their email account.		
1.4.4	* Ability for Instructor to determine who the students may email (all users in the course, Instructors, TAs, Groups).		
1.4.5	By default, students should only be able to email the Instructor of the course.		
1.4.6	* Functionality to send an email from within Groups tool in the course, for easy email of a subset of students.		
1.4.7	Functionality to send an email from within other tools in the course, for easy email of a subset of students.		
1.4.8	By default, prepended subject field with the shellcode in order to identify the email and facilitate email filtering.		
1.4.9	* Ability to attach documents.		
1.4.10	Ability to access a history of sent messages (include subject, date/time, recipients, sender)		

#### 1.5 Calendar/Scheduling

Req #	Requirement	Y/N	Further Details?
1.5	<b>Calendar/Scheduling</b>		
1.5.1	Ability to enable a course calendar		
1.5.2	Ability for Instructor to add events to a course calendar.		
1.5.3	Ability for students to add their own events, notes, reminders, etc. to a personal calendar (not the course calendar)		
1.5.4	Ability for users to view calendars combined (i.e. all course calendars plus personal calendar).		
1.5.5	Ability for users to view calendars individually.		
1.5.6	Ability to select view (such as day, week, month)		
1.5.7	Allow the ability to create recurring calendar entries		

1.5.8	Ability for Instructors to edit calendars individually for multiple course sections (different due dates, etc.) within the same course shell, where students only see the due dates for their own sections.		
1.5.9	System has various ways to edit and reschedule events.		
1.5.10	Search calendar events by various criteria (keyword, etc.)		
1.5.11	Ability for any user to filter calendar events by type (i.e due dates, etc.)		
1.5.12	Ability for Instructor to initiate a calendar event from within a course tool that is date-specific. (For example: assignment due dates, scheduled chat sessions, quizzes, sign-up sheets)		
1.5.13	Ability for Instructor to initiate a calendar event from within a third-party course tool that is date-specific. (For example: assignment due dates, scheduled chat sessions, quizzes, sign-up sheets)		
1.5.14	Ability to set automated reminders for calendar events. (i.e. email or pop-up a week prior to due dates, etc.)		
1.5.15	Integration with Google Calendar: Export/sync to Google calendar (list how this is possible in the further details column: IE. via API, building block, or even just ical subscription URL)		
1.5.16	Ability to integrate and sync with other calendars.		

## 1.6 Instant Messaging

Req #	Requirement	Y/N	Further Details?
1.6	<b>Instant Messaging</b>		
1.6.1	ability to do instant messaging one-to-one		
1.6.2	Ability to do group chat (multiple participants). List the max number of users that can participate in a chat simultaneously.		
1.6.3	Ability for the user to show/hide his/her presence.		
1.6.4	Ability for user to change status to Online, Away, Free to chat, On the phone, Do not disturb.		
1.6.5	Ability to block users from contacting you or seeing your presence.		
1.6.6	Provides the ability to share files in the IM tool (list any file type restrictions or size limitations?)		
1.6.7	Provide the ability for two-way video in the IM tool. List if the video chat requires plug ins		
1.6.8	Ability to record chat text history, configurable by instructor		
1.6.9	Ability to initiate encrypted chat session with another user. Chats will be encrypted over tls across the network.		
1.6.10	Works with most XMPP/Jabber clients (Windows, OS X, iOS, Android, etc)		
1.6.11	Ability to configure the system so that presence information is hidden for all users by default.		



## 1.7 Virtual Meetings

Req #	Requirement	Y/N	Further Details?
1.7	Chat Tool/Virtual Meetings		
1.7.1	Provide the ability for people to meet virtually to share information.		
1.7.2	Ability to chat using voice, text and video.		
1.7.3	When multiple video users are sharing their video, the active speaker's video should be the largest.		
1.7.4	For users sharing voice or video provide option to mute microphone and pause video.		
1.7.5	Provide instructor ability to record all virtual meetings (even when the instructor is not present).		
1.7.6	Provide virtual meeting functionality for subgroups of course users, to be managed or initiated by group members.		
1.7.7	Be able to email the virtual meeting history.		
1.7.8	Provide the ability to mark up virtual meeting content (both graphic and text). For example draw or write on top of pages in an embedded ppt.		
1.7.9	Raise your hand feature.		
1.7.10	Speed up or slow down presenter's pace requests.		
1.7.11	Ability to do a quick poll or survey.		
1.7.12	Ability to share quick poll or survey results with the class.		
1.7.13	Audio bridge into audio conferencing system.		
1.7.14	Integration with other video conferencing systems (examples: Cisco, Skype, Vydeo)?		
1.7.15	Provide ability to share desktop.		
1.7.16	Provide the ability to share desktop at different quality levels and frame rates.		
1.7.17	Ability to customize layout.		
1.7.18	Ability to lock the layout in individual courses.		
1.7.19	Ability to Hold people in a queue prior to meeting.		
1.7.20	Out of band communication for presenters.		
1.7.21	Capability for Person to person or private text chat.		

1.7.22	Ability to have breakout rooms based on course groups.		
1.7.23	Allow users to select their chat text color.		
1.7.24	Ability for instructor to type notes during the online meeting and be able to email the notes to self (and students?)		
1.7.25	Ability for instructor to post documents that students can download from the virtual meeting.		
1.7.26	Provide users with audio setup wizard to set up their speakers/headphones and microphone.		
1.7.27	Ability to put a meeting on hold (coffee break.)		
1.7.28	Allow instructor to prepare activities during the meeting in an area not visible to students.		
1.7.29	Instructor should be able to give students a presenter role, for activities like student presentations and control the outputs in the display.		
1.7.30	Students can ask questions that are managed in a Q&A format (i.e. Instructors/TAs can decide who will respond as well as make that question/answer visible to the entire class or just the one student.		
1.7.31	Non-Ryerson users (Guest Speakers) should be able to join/present during virtual meetings.		
1.7.32	Provide Administrators with virtual meeting reports/logs.		
1.7.33	Provide all users with same roles they have in the LMS.		
1.7.34	Ability to present and capture (for later playback) a lecturer and corresponding Power-Point slides side by side.		

### 1.8 Collaboration Tools (collaborative, blog and wiki tools)

Req #	Requirement	Y/N	Further Details?
1.8	<b>Collaborative Documents (tools such as Wiki, Google Drive incl)</b>		
1.8.1	Do you have an integration with Google Docs (on class and group-level)?		
1.8.2	Ability to embed a Google Doc for class or group collaboration.		
1.8.3	Enable a collection of collaborative pages, to be set up by Instructor with possible contributions by any member of the shell.		
1.8.4	Multiple users may edit a collaborative page at the same time, with the ability to view the changes in real-time.		
1.8.5	If it is not possible to view changes in real-time, it is possible to LOCK editing of a document that someone else is working on.		
1.8.6	Collaborative pages are primarily built using the standard WYSIWYG editor (text, images, embedded from external sources, etc.)		
1.8.7	Collaborative pages should be built in a hierarchy, to allow for the creation of 'sections'.		

1.8.8	For each collection of collaborative pages, Instructor can view a list of students, with the amount of contribution per student (i.e. word count, percentage contribution) and the ability to click through to view and assess the content of each student's contribution.		
1.8.9	Instructor can enable grading of a collection of collaborative pages.		
1.8.10	If grading is enabled for a collection of collaborative pages, a column is automatically created in the grading tool that is linked to the assessment area of the collaborative page tool.		
1.8.11	Instructor can set visibility for a collection of collaborative pages - instructor only, entire class, group, etc.		
1.8.12	A group-level version of the collaborative document tool is available.		
1.8.13	Ability to create individual collections of collaborative pages per student using one form to set criteria.		
1.8.14	Provide a history of change on the collaborative document, with the ability to restore a previous version.		
	<b>Blog Tool</b>		
1.8.15	Enable a collection of posts, ordered by date, to be set up by Instructor with possible contributions by any member of the shell.		
1.8.16	Posts are primarily built using the standard WYSIWYG editor (text, images, embedded from external sources, etc.)		
1.8.17	Posts may be "tagged" with keywords in order to build a thread between posts on the same topics. The tags would be listed in the blog sidebar, and clicking on a tag would bring up a subset of posts featuring that tag.		
1.8.18	Posts may be viewed by author, date, tag (via links in the sidebar).		
1.8.19	Instructor can view a list of students, with contribution stats (incl number of posts, number of comments, number of words) per student and the ability to click through to view and assess the content of each student's contribution.		
1.8.20	Instructor can enable grading of a blog.		
1.8.21	If blog grading is enabled, a column is automatically created in the grading tool that is linked to the assessment area of the blog tool.		
1.8.22	Instructor can set visibility for blog - instructor only, entire class, group, etc.		
1.8.23	Is a group-level version of the blog tool available?		
1.8.24	Ability to create individual blogs per student using one form to set criteria.		


## 2. Assessment

### Tools and Features that Enable Student Assessment

#### 2.1 Grading

Req #	Requirement	Y/N	Further Details?
2.1	<b>Grading Tool</b>		

Grading Tool Basics			
2.1.1	* Provide a centralized gradebook for each course shell		
2.1.2	* Ability for Instructor to create gradebook columns		
2.1.3	* Instructor may create columns of different data type, such as numeric, alphanumeric, percentage, letter grade, complete/incomplete etc.		
2.1.4	* Ability to categorize columns. (i.e. assignment, midterm, final grade, quiz)		
2.1.5	* Ability for Instructor to create categories.		
2.1.6	Auto-save of each grade as it is entered into a cell. (As opposed to editing the whole column and saving at the end)		
2.1.7	Ability for Instructor to move a column in three clicks or less (when already in the gradebook).		
2.1.8	Ability for Instructor to select column visibility for their own view of the gradebook.		
2.1.9	* Ability for Instructor to select column visibility for the students		
2.1.10	Ability for Instructor to select column visibility for selected students and groups.		
2.1.11	When a column is created (either manually or by another tool), the students should not be able to see the column by default. The Instructor should have to make it visible.		
2.1.12	* Ability for Instructor to edit all column settings.		
2.1.13	Ability for Instructor to duplicate a column and its settings within the gradebook.		
2.1.14	* Ability for Instructor to remove columns		
2.1.15	* Ability for Instructor to rename columns		
2.1.16	Ability for Instructor to select multiple columns at once, to apply a change to all.		
2.1.17	Ability for Instructor to batch remove columns (as opposed to one-at-a-time)		
2.1.18	Ability for Instructor to batch change visibility of columns.		
2.1.19	Ability for Instructor to apply other changes to multiple columns at once (such as rename)		
2.1.20	Ability for Instructor to batch create columns.		
2.1.21	* Extra level of security, presented via dialog box, to prevent accidental deletion of columns that contain grades, assignment submissions, etc.		
2.1.22	Ability to enter a grade for a student in 3 or fewer clicks (from in the gradebook).		
2.1.23	* Provide the ability to override grades for assessments		
2.1.24	Ability to display dynamic column numbers.		

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2.1.25	Rowcount (simple interface to count the number of students currently visible)		
2.1.26	Print function (not just the browser print, but a fully compiled spreadsheet that can be printed without downloading first)		
2.1.27	Ability to customize print (by selecting which columns to print, print filtered results, etc.)		
2.1.28	Ability for Instructors to track all changes to the gradebook (add/remove column, add/remove grade, change of settings, etc.), including who made the change and when. This is from the GUI, not a log search.		
2.1.29	Instructor can customize the display of columns. (including column width, text alignment, number of decimals to display, etc.)		
2.1.30	Ability for Instructors to enter grades in the Gradebook while not connected to the Internet (offline)		
2.1.31	Ability for Instructors to enter grades in the Gradebook while logged in to the system from a Mobile device.		
2.1.32	Ability to restrict TA's access to gradebook via custom criteria (i.e. filter by specific to limit TA to their own section)		
	<b>Feedback</b>		
2.1.33	Ability to add text-based feedback to a grade in 3 or fewer clicks (from in the gradebook).		
2.1.34	Ability to provide a variety of feedback types (e.g., * text, audio, video).		
2.1.35	Ability to choose to display text feedback on the spreadsheet itself (no additional clicks needed to view it).		
	<b>Searching, Sorting &amp; Filtering</b>		
2.1.36	* Ability to identify students who have dropped the course.		
2.1.37	Ability to automatically/dynamically filter out students who have dropped the course (i.e. are "inactive" in the course)		
2.1.38	* Ability to filter gradebook data by custom criteria (i.e. by sections of students, by student performance on tests, by column category, groups etc. )		
2.1.39	Ability to search the entire grade center by keyword.		
2.1.40	Ability to filter search results by selecting criteria within the search interface. (filter by student name, filter by column name, column type)		
2.1.41	Student visibility should be dynamically set, using filtering by criteria, with no ability to manually hide individual students.		
2.1.42	Ability to select a single column and view only it and all associated details on one page (i.e. column settings, student list, grades, number of attempts feedback, attached files)		
2.1.43	* Ability to sort by any grade column.		
2.1.44	Ability to select a secondary sort key. (i.e. sort by last name within each section)		
	<b>Calculations &amp; Formulas</b>		
2.1.45	* Ability to create a column that weighs other specified columns.		
2.1.46	Ability to create a column that averages other specified columns.		

2.1.47	* Ability to create a column that adds other specified columns together.		
2.1.48	Ability to calculate by column category or grouping (i.e. quizzes, weekly sessions)		
2.1.49	Ability to drop a grade in the calculation, by criteria (i.e. drop lowest, drop highest, drop last)		
2.1.50	Ability to calculate students' scores (average, median, total, etc.) for individual columns.		
2.1.51	Ability to include Bonus marks to a final grade calculation.		
2.1.52	Ability to use calculated columns, with calculation formula customized by instructor.		
	<b>Integration</b>		
2.1.53	* Provide the ability to integrate with third-party assessment tools, including the following: Turnitin, WebAssign, McGraw-Hill Connect, Clickers, etc.		
2.1.54	Ability for instructor to assess and grade discussion participation and postings (hooks into gradebook tool, aggregates user's posts and gives basic quantitative stats)		
2.1.55	Ability for students, teaching assistants, to rate other students on discussion postings (connects with the grading tool for assessment purposes)		
2.1.56	Provide ability for Instructors to transfer the final calculated grades from Gradebook to Ryerson's student information system.		
2.1.57	Provide the ability to transfer grades from a test response system (such as Ryerson's scantron based test response system) to the Gradebook.		
2.1.58	Ability to assign a student with an "incomplete" or other status, and submit this to the student information system.		
	<b>Advanced</b>		
2.1.59	* Ability to create and edit grade schemas / ranges (i.e. to implement letter grades)		
2.1.60	Ability to allow Instructors to customize existing Grade Schemas / Letter Grades.		
2.1.61	Ability to lock the grade schemas system wide (so Instructors can not edit)		
2.1.62	ability to record assessment results from standard integration packages (such as SCORM and AICC)		
2.1.63	When removing a column tied to other tool (assignment, clickers, etc) and vice versa, the Gradebook is synchronized.		
	<b>Import/Export</b>		
2.1.64	* Ability for Instructor to export any/all content/columns/comments from gradebook to spreadsheet file (like .csv, .xls) for offline viewing.		
2.1.65	* Ability for Instructor to import data into the gradebook from a spreadsheet file (like .csv, .xls). Data may be imported into an existing column, or may represent a new column.		
2.1.66	Ability to selectively choose what to import or export.		
2.1.67	Ability to import a comments column (paragraph format) from a spreadsheet.		

<b>Rubrics</b>			
2.1.68	Provide the ability for Instructors, Students and TAs to use rubrics to grade anything that can be assessed.		
2.1.69	Ability to create rubrics		
2.1.70	Ability to edit rubrics and give a warning if that rubric is in use		
2.1.71	Ability to delete rubrics and give a warning if that rubric is in use		
2.1.72	Ability to customize rubric columns and rows.		
2.1.73	Ability to customize rubric scoring/weighting.		
2.1.74	Ability to choose rubric type (example: percentage, points, text, etc.)		
2.1.75	Provide the ability to use one rubric in multiple course shells.		
2.1.76	Provide the ability to copy rubrics from semester to semester.		
2.1.77	Provide the ability to copy rubrics from one course to another.		
2.1.78	Ability to export and import rubrics.		
<b>Other Grading Types</b>			
2.1.79	When grading a graded item, (assignments, wiki, blog, and other tools) ability to see details such the name of who submitted, student number, user name, submission date/time, and including the group name and a list of the group members where applicable		
2.1.80	Have option "to grade" various tools, which will then create a column in the gradebook. For example, discussion forum, blogs, wikis.		

## 2.2 Tests and Surveys

Req #	Requirement	Y/N	Further Details?
2.2	<b>Tests and Surveys</b>		
	<b>Basic Test Creation</b>		
2.2.1	Provide the ability to add audio to test questions and answer choices		
2.2.2	Provide the ability to include video in test questions and answer choices		
2.2.3	* Provide the ability to include images in test questions and answer choices		
2.2.4	Provide the ability to include external links in test questions and answer choices		
2.2.5	Provide the ability to include animations in test questions and answer choices		

2.2.6	Provide the ability to include other file formats (ex. Word, PDF, etc.) in test questions and answer choices		
2.2.7	* Allow the use of mathematical symbols in test questions and answer choices		
2.2.8	Provide the ability for testing tools to randomize test answers.		
2.2.9	* Provide the ability for testing tools to randomize test questions.		
2.2.10	* Provide the ability to grade objective quizzes (example: multiple choice) automatically		
2.2.11	Ability for instructor to choose to reveal student's own answers upon submission of test		
2.2.12	* Ability for instructor to choose to reveal score to students upon submission of test		
2.2.13	Ability for instructor to choose to reveal feedback to students upon submission of test		
2.2.14	* Ability for instructor to choose to reveal the correct answers to students upon submission of test		
2.2.15	* Ability to assign points to each test question		
2.2.16	Ability to assign partial points and negative points		
2.2.17	* Ability to group questions into pools/question banks		
2.2.18	* Ability to call questions from pools/questions banks into tests		
2.2.19	Ability to call questions from pools/questions banks into tests based on meta-data		
2.2.20	Ability to call a defined number of random questions from a question pool/bank and present each student with a different set of random questions		
2.2.21	* Ability to allow for anonymous test response (surveys)		
2.2.22	* Automatically create column in the Gradebook when an Test is created		
	<b>Offline Tests</b>		
2.2.23	Ability to create tests or question banks offline, for later publishing.		
2.2.24	Ability to use a third-party offline tool to publish tests or question banks.		
	<b>Types of Questions</b>		
2.2.25	* Allow Multiple Choice questions		
2.2.26	Allow calculated formula questions		
2.2.27	Allow calculated numeric questions		
2.2.28	Allow either/or questions		



2.2.29	Allow file response questions		
2.2.30	Allow fill in multiple blanks questions		
2.2.31	* Allow fill in the blank questions		
2.2.32	Allow jumbled sentence question		
2.2.33	*Allow multiple answer question		
2.2.34	Allow opinion scale/Likert		
2.2.35	Allow ordering questions		
2.2.36	Allow quiz bowl questions		
2.2.37	Allow short answer questions		
2.2.38	* Allow Long Answer/Paragraph questions		
2.2.39	Allow Matching questions		
2.2.40	Allow True or False questions		
2.2.41	Allow Word Scramble questions		
2.2.42	Allow hot spot questions		
2.2.43	Allow drag and drop questions		
	<b>Import/export</b>		
2.2.44	Ability to import/upload questions from document (word, excel, etc.)		
2.2.45	Ability to export/download questions/tests into editable file format.		
2.2.46	Provide the ability to import and export items using standard package formats (such as IMS Question and Test Interoperability).		
	<b>Storing &amp; Copying</b>		
2.2.47	Be able to copy tests containing questions pulled randomly from one or more question pools (incorporating all the pools being used in the random block) from one course to another		
2.2.48	Allow stored question databases to be shared across multiple courses & with multiple Instructors		
2.2.49	Ability to remove tests in bulk		
2.2.50	Ability to remove test pools/banks in bulk		
2.2.51	Ability to search test questions in the question pools/banks based on keywords, meta-data and category		

	<b>Administering Tests</b>		
2.2.52	* Ability to set the amount of time the student has to complete the test once they have started		
2.2.53	Provide ability to set different assessment time and duration for individual students (e.g, students with disabilities who need more time)		
2.2.54	* Ability to limit the number of attempts		
2.2.55	Ability to deploy tests to groups (not just individual students)		
2.2.56	Provide notification or reminders for un-submitted attempts		
2.2.57	Allow instructor to administer "self assessment" or practice tests		
2.2.58	Allow instructor to see history and details		
2.2.59	Allow for question branching		
2.2.60	Can the system provide branching based on test item performance (i.e., if question is missed, automatically route the user to a specific course location)?		
2.2.61	Ability to control presentation of questions - one at a time, or grouped into pages		
2.2.62	Ability to provide headers/section titles for groups of questions presented		
2.2.63	Ability for students to use mathematical symbols in test answers		
2.2.64	Provide the ability to provide hints on questions (describe how they function)		
	<b>Conditional Release (test-specific items)</b>		
2.2.65	Provide options for conditional question release within a test. For example, until question 1 is answered correctly, question 2 will not be presented.		
2.2.66	Ability to allow students to repeat tests until certain score is reached.		
2.2.67	Provide the ability to set conditions (i.e., hide/show, dates) for multiple assessments at the same time.		
	<b>Anti-cheat measures</b>		
2.2.68	Provide the Instructor the ability to use lock computers to prevent students from accessing other resources and communicate with others while taking a test (ensure assessment security and integrity).		
2.2.69	Provide the Instructor the ability to allow IP restrictions to ensure assessment can only be taken in certain locations (campus lab).		
2.2.70	Provide the Instructor the ability to set a password for access to test for assessment security.		
	<b>Printing</b>		
2.2.71	Ability to get a Printable version of the test		
2.2.72	Ability to print questions and/or exams in a readable format for accommodation of students with different needs		

2.2.73	Ability to restrict printing of tests		
	<b>Other</b>		
2.2.74	The ability to deploy course evaluations from the institution level.		

### 2.3 Assignments

Req #	Requirement	Y/N	Further Details?
2.3	Assignments		
	<b>Assignment Creation</b>		
2.3.1	* Capability to create and deploy assignments where student can upload a file as an assignment submission		
2.3.2	Capability to create and deploy Group assignments, where ONE/any group member can submit on behalf of the group, and it assigns the submission (and resulting grade) to all group members		
2.3.3	Ability for instructor to allow any and all group members to submit for any part of an assignment, not just a single "group leader" (multi-part assignment, revisions, resubmissions, multiple attempts)		
2.3.4	Ability for instructor to configure single, defined number, or unlimited submission attempts		
2.3.5	* Automatically create column in the Gradebook when an assignment is created		
2.3.6	* Ability for instructor to allocate points for an assignment		
2.3.7	Ability to create multi-part assignment		
2.3.8	Ability to allow students to submit revisions		
2.3.9	Provide the ability for system admins to change the file size limit on files that are submitted		
	<b>Assignment Submission</b>		
2.3.10	Capability for students to submit multiple files for one assignment submission attempt		
2.3.11	Ability for Instructors to define submission file type, where students are restricted to only submitting that file type		
2.3.12	* Ability for instructor to set an assignment due date and time, and ability to restrict submissions past this date.		
2.3.13	Allow Assignment Submissions from Google Drive		
2.3.14	* Ability for Instructors to see student submission dates and time for an assignment		
2.3.15	Provide students with receipts for assignment submissions		
2.3.16	Ability for instructor to grant extensions for individual users or the class for assignments		

2.3.17	Ability for the instructor to allow students to resubmit an assignment		
	<b>Retrieving Assignments</b>		
2.3.18	* Instructor has the ability to batch download/export the assignment submission files		
2.3.19	* Instructor has the ability to download individual student's submission files		
2.3.20	Instructor has the ability to batch upload marked-up assignments and release back to students		
2.3.21	* When batch downloading assignments, it must be clear to Instructors who submitted and what assignment it is		
	<b>Assignment Grading</b>		
2.3.22	* Allow Instructors to grade assignments		
2.3.23	* Allow Instructors to provide feedback on assignments		
2.3.24	Ability to do Inline marking, including annotation, commenting, rubrics, grade interface (like Grade Mark in Turnitin)		
2.3.25	Ability for Instructors to download the feedback they've given students		

## 2.4 Peer Assessment

Req #	Requirement	Y/N	Further Details?
2.4	Peer Assessments		
2.4.1	Ability for students to evaluate other student's assignments, presentations, etc.		
2.4.2	Allow student to grade/evaluate each other anonymously		
2.4.3	Allow groups to evaluate other groups anonymously		
2.4.4	Have "update" functionality to re-sync members of pairs/groups		
2.4.5	Allow the instructor to overwrite members' pairing/grouping (e.g. to handle students who drop or register late and exclude students who did not submit assignments)		
2.4.6	Ability to include the results of peer-reviewed evaluations in grading		
2.4.7	Ability for instructor to allow students to see/review peer evaluations of their work		
2.4.8	Ability for Instructor to allow the peer-evaluator to resubmit their evaluations		
2.4.9	Ability for students to evaluate the contribution of each of their group members		

2.4.10	Ability for Instructors to provide rubrics to the evaluators		
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## 2.5 Analytics

Responses for this section should pertain to GUI features

Req #	Requirement	Y/N	Further Details?
2.5	Analytics		
	<b>Reporting Test Results</b>		
2.5.1	Granular data results (various aggregation, averages, medians, per question, per test, per category, etc.)		
2.5.2	Ability to generate various reporting formats, e.g. charts, spreadsheets, graphs, etc.		
2.5.3	* Ability to export/download student response data (raw and aggregate data)		
2.5.4	Ability to print data and graphs		
2.5.5	Provide the ability to analyze and report test results, and then flag interesting/unexpected/extreme results (i.e.. a large number of students answered a specific question)		
2.5.6	Ability to track and log student activities while taking the test (footprints, time on task). For example when students select an answer (i.e. time stamp of answer choice) within a test or survey		
	<b>Grade Reporting</b>		
2.5.7	Provide the ability to support statistical analysis of assessment results.		
2.5.8	The ability to compare the statistics of multiple assessments		
2.5.9	Ability for the instructor to display graphs showing average class marks distributions		
2.5.10	Provide the ability to create standard and customized reports on individual students grades, and also on overall class grades		
2.5.11	Ability to generate reports based on multiple criteria (ex. all students that got below 50% on more than one assessment)		
2.5.12	Does the system provide both pre-testing and post-testing capabilities (including reports that compare pre- and post-test performance)?		
	<b>Aggregate Data</b>		
2.5.13	Provide detailed student tracking for each course tool (How many discussion posts were read, how long did they spend on each quiz question)		
2.5.14	Provide reporting on individual level activity		
2.5.15	Provide reporting on course level activity		
2.5.16	Provide reporting on program level activity		

2.5.17	Provide detailed reports on student activity (log in, log out, duration, last accessed, IP)		
2.5.18	Ability for system administrators to enable Instructors/students to see who is currently logged into courses.		
2.5.19	Are there alternative customized modules that can be built for tracking activity?		
2.5.20	The ability to export completion records for compliance training and performance, competency and career development to the HR system (PeopleSoft)		
2.5.21	Provide the ability to keep a student activity history in a course after the student has dropped the course.		

### 3. Content

Features that enable the Instructor and Course Admins to create, attach, deploy and manage all forms of course content.

Req #	Requirement	Y/N	Further Details?
	<b>Posting Content</b>		
3.1.1	* Ability for Instructor to post a file as course content		
3.1.2	* Provide the ability to copy of specific content items to a different course		
3.1.3	* Ability for Instructor to add/edit content in-line (using a WYSIWYG editor)		
3.1.4	* Ability for Instructor to post links to external websites		
3.1.5	Ability for Instructor to post audio and video files		
3.1.6	Capability to use drag and drop to upload content directly into course content space (not into a separate file management area, but directly into the space where students will see it)		
3.1.7	* Ability to integrate publisher content (epacks, cartridges, packages)		
3.1.8	Ability to aggregate content from an external feed (RSS or Atom) for display within the course.		
3.1.9	Ability to edit a document inline after uploading.		
3.1.10	Ability to tag content with meta data		
3.1.11	Ability to use different metadata schemes for tagging content		
3.1.12	Ability to use metadata in search		
	<b>Managing &amp; Organizing Content</b>		
3.1.13	* Ability to organize content into folders		

3.1.14	* Ability to move existing content into folders		
3.1.15	* Ability to reorder or reorganize existing content		
3.1.16	Ability to reorder or reorganize existing content using drag and drop		
3.1.17	* Ability to hide content and content folders from students (only visible to Instructor)		
3.1.18	Ability to share content across multiple course shells		
3.1.19	* Ability to edit content after posting.		
3.1.20	Ability for Instructor to enforce the order that content is accessed.		
3.1.21	Ability for Instructor to develop a modular structure for content organization (i.e. chapters, weeks, modules, or other criteria used to divide the course)		
3.1.22	Ability to make content visible to the public		
3.1.23	Ability to share content with specific people outside of the LMS, using some kind of authentication to limit access to only those users.		
	<b>Viewing Content</b>		
3.1.24	Ability for Instructors to track student's progress in content consumption/access.		
3.1.25	Ability for users to track their own progress in content consumption/access.		
3.1.26	Ability to display audio and video files embedded in the site (not just a link to a file), without requiring that the Instructor generate/provide their own embed code.		
3.1.27	Ability to display common file types embedded in the site (Word, Excel, PDF, for example - please specify)		
3.1.28	* Ability for users to download content files		
3.1.29	Ability for users to bookmark content items for easy review.		
3.1.30	Ability for users to annotate content for their own view.		
3.1.31	Ability for users to select sections of content to be printed, and generate a print-friendly package of content.		
3.1.32	Ability for users to select sections of content and generate a downloadable package of content.		

#### 4. Course Design and Management

Features that enable the Instructor and Course Admins to manage the course and modify the look and feel

##### 4.1 Course Design

Req #	Requirement	Y/N	Further Details?
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4.1	<b>Course Design</b>		
4.1.1	Ability for Instructors to customize the interface (i.e. *colors, themes, *banners, buttons/links, course content layout, table of contents, course title)		
4.1.2	Ability for Admin to set a specific/custom default layout for each department/school.		
4.1.3	Ability for Admin/Instructor to customize interface labels/buttons in the course menu (change text on a button, link or label)		
4.1.4	* Provide visual indicators to Instructors on links/content/tools/gradebook items/assessments, etc that are not visible to students.		
4.1.5	Provide the ability for students to archive and export their own course activities.		
4.1.6	Ability to create not only course shells, but also organizations that may contain 50,000 users, where an organization be used for a variety of uses (departmental, project/research-based, program)		

#### 4.2 Course Management

Req #	Requirement	Y/N	Further Details?
	<b>Manage Users</b>		
4.2.1	Ability for an instructor to identify students (i.e. at risk students, students who missed a deadline, etc)		
4.2.2	* Ability to handle large classes of 5,000 active students and organizations of 50,000		
4.2.3	List your maximum number of active users in a shell that can be handled without impact on system performance	N/A	
4.2.4	* Ability to have multiple Instructors sharing a course		
4.2.5	Ability to assign specific Instructors or TAs to specific student sections within the same course shell.		
4.2.6	* Ability for system to add users with various defined roles (levels of access) to courses: Instructors, Co-Instructors, Teaching Assistants (TA), Graders, Students.		
4.2.7	Ability to export completion records for compliance training and performance, competency and career development to the HR system (students/Instructors can download assessment results/reports, certificates of completion, etc)		
4.2.8	Can admins restrict Instructors from changing their role in the LMS		
	<b>Manage Course Content</b>		
4.2.9	* Provide the ability for a user to export a course (content, tests, tools) and import the resulting package into other courses.		
4.2.10	Ability to post/release content/assessments/tools/communication for specific student sections.		
4.2.11	Ability to access history of all changes in the course (communications, content, assessments) with data for each change (who, when)		



4.2.12	Ability to roll individual items back to a previous version. (for example, specific piece of content)		
4.2.13	Ability to track student completion/test results for all courses in which each student is enrolled.		
4.2.14	What authoring tools does the system support? Ability for Instructors to edit content in the system (vs. downloading a file, editing it on the computer and re-uploading it).		
4.2.15	Does the system support the ability to roll back to a previous version of content?		
<b>Manage Course Settings</b>			
4.2.16	* Ability to make a course available/not available to students		
4.2.17	Ability to categorize and group courses per Terms/Years/Departments		
4.2.18	Ability to change settings per group of courses, based on Term/Year/Departments (i.e. select course category 'Fall 2014' and make all courses unavailable to users).		
<b>Manage Course Tools</b>			
4.2.19	* Ability for Admin to set which tools are visible in a course by default.		
4.2.20	* Ability for Instructors to set which tools are visible/used in a course.		
<b>End-Of-Term</b>			
4.2.21	* Ability for Instructors to download/export the course content, student reports, assessment submissions, grades, communications that they can save on their computer.		
<b>Adaptive Release / Conditional Release / Release Criteria</b>			
<i>In the following section, the term "item" is used to refer to ANY area of the shell that allows adaptive release.</i>			
4.2.22	* Provide the ability to selectively release items to students based on multiple criteria.		
4.2.23	* Ability to define how long an item is available for a student to access (start and end date)		
4.2.24	Provide the ability to selectively release items to an individual or select individual(s)		
4.2.25	Provide the ability to selectively release items based on membership in a group		
4.2.26	Provide the ability to selectively release items based on grade book data		
4.2.27	Provide the ability to selectively release items only to users who have attempted a specified assessment (quiz/survey/assignment)		
4.2.28	Provide the ability to selectively release items only to users who have reviewed a certain piece of content or area of the course shell.		
4.2.29	Provide ability to mass update release dates/times (for example, when a shell is copied and the dates need to be updated to the new term's dates)		
4.2.30	Provide ability to set DIFFERENT release criteria to different people / groups of people		
<i>Which areas allow for adaptive release?</i>			

4.2.31	*Content (all levels, including folders and individual content items)		
4.2.32	*Quizzes / Tests / Surveys		
4.2.33	*Assignments		
4.2.34	Tools		
4.2.35	Groups		

## 5. Application Administration

Features available to the front-end admin team for management and support of the system

### 5.1 Application Administration (General)

Req #	Requirement	Y/N	Further Details?
5.1	<b>Application Administration (General)</b>		
	This section relates to our IT team responsible for assisting faculty with setting up and managing their courses. This group has administrative privileges and acts as the front line of support and works closely with Instructors		
5.1.1	* Provide the ability to configure the interface to Ryerson standards (colour schemes, logos, headers/footers)		
5.1.2	* Provide the ability for administrators to post and edit system-wide announcements.		
5.1.3	* Granular admin configurations for tools/features (i.e. so that we can turn on or off and HIDE features we do not use)		
5.1.4	Ability for system administrators to define allowable file types for any kind of file upload submissions (i.e. assignments)		

### 5.2 User Management

Req #	Requirement	Y/N	Further Details?
5.2	<b>User Management</b>		
	<b>General</b>		
5.2.1	* Ability to provision users to the system based on their institutional role in Ryerson's identity and resource management system (integration with RU's Identity Management System (encompassing systems such as SAS and HR))		
5.2.2	Provide the ability to assign course administrators to a selected group of courses based on institutional role and/or course category.		
5.2.3	* Provide the ability to manage user profiles, where roles other than the ones in Ryerson's Identity Management System need to be assigned in the LMS		

5.2.4	Provide the ability to assign storage space parameters based on user role.		
5.2.5	Provide the ability to modify/update/restrict specific users storage space.		
5.2.6	* Ability for System Administrator to search and edit users in the system based on personal details (user name, Last/First Name, student number)		
5.2.7	Ability for Admin to search and edit users in the system based on system roles.		
<b>Role Management</b>			
5.2.8	* Provide the ability to define system roles and course roles.		
5.2.9	* Provide the ability to assign privileges to course roles (i.e. Instructors should have access to all system-defined course areas and tools, students should have read-only access to content and student tools and not to the Grade book, guests should have access only to areas/tools that instructor sets, etc)		
5.2.10	* Provide the ability to assign privileges to system roles (i.e. System Administrator should have access to all system settings, Help desk role should have limited access to courses, Course Administrator should have access to specific course category - Term, Department, and a system admin role for a subset of courses, etc)		
<b>Course Enrollments / Shell Membership</b>			
5.2.11	Ability to add users to courses based on their enrollment information in RU's Identity Management System (encompassing systems such as SAS and HR)		
5.2.12	* Ability to add one or more sections to a course (combined sections)		
5.2.13	Ability to automatically identify the section each student belongs to within the course shell based on their enrollment information in RU's Identity Management System		
5.2.14	* Ability to disable/remove users from courses based on their enrollment information in RU's Identity Management System (encompassing systems such as SAS and HR)		
5.2.15	* Ability to update users access to courses (drop from a course and re-add to another) based on their enrollment information in RU's Identity Management System (encompassing systems such as SAS and HR) (section number)		
5.2.16	* The dropped/disabled students should not have access to a course content, tools, receive emails ,etc.		
5.2.17	* Ability for Admin to manage user registrations (manually add/remove courses to a users accounts)		
5.2.18	* Ability for admin and Instructors to add course users outside of the course registration (add/drop students, add/remove guests, etc...)		
5.2.19	Ability for admin to enable and disable self-enrollment for a subset of courses		

### 5.3 Course Shell Creation and Management

Req #	Requirement	Y/N	Further Details?
5.3	<b>Shell Creation &amp; Management</b>		

5.3.1	* Ability for system administrator to control who can create new courses in the LMS.		
5.3.2	* Ability for admins to create courses while copying content and tool settings from previous courses (i.e. create a F2014 course based on a F2013 course) for a specific term.		
5.3.3	Ability for admin to create courses based on a selected template (department/school template, etc) for a specific term.		
5.3.4	Ability for admin to batch create courses (new or copies)		
5.3.5	* Ability for admin to delete courses in batches		
5.3.6	* Ability for admin make multiple courses visible/not visible to students.		
5.3.7	* Ability for admin to disable Instructors' access to specified courses at the end of term.		
5.3.8	* Ability for admin or Instructors to copy specific course content/areas/tools from a course to another		
5.3.9	* Ability for admin or Instructors to export a course package that can include the course content, tools, assessments, etc (but not the student data).		
5.3.10	* Ability for admin or Instructors to import a package exported from a course.		
5.3.11	Ability to create courses that can be open to non-Ryerson users		
5.3.12	Ability to keep old courses in the system for a specified number of years (in accordance with Ryerson retention policy) and be able to allow Instructors to access them for various reasons (appeals, reviews, etc)		

## 6. General Other

### 6.1 Notifications and User Updating

Req #	Requirement	Y/N	Further Details?
	<b>Notifications</b>		
6.1.1	Ability for sys admin to enable email notifications to users when course shells, organizations, etc. are updated.		
6.1.2	Ability for sys admin to specify which areas within shells should be available for notifications. (i.e. content, communications, grades)		
6.1.3	Ability for individual users to opt-in to notifications		
6.1.4	Ability for individual users to select which courses or organizations to receive notifications for.		
6.1.5	Ability for individual users to select which areas within shells to receive notifications for (i.e. content, communications, grades)		
6.1.6	Ability to send institution-wide notifications to ALL system users, regardless of whether they have opted-in to notifications.		
6.1.7	Ability for sys admin to set grouping of notifications (i.e. individual, digest)		
6.1.8	Ability for sys admin to set timing of notifications (i.e. digest email sent at 2am)		

6.1.9	Ability to control the flow of emails, to prevent strain on the system		
	Please indicate which of the following areas are included in notifications:		
6.1.10	Content (New content added, modified)		
6.1.11	Assignments (new assignment posted)		
6.1.12	Due date reminders		
6.1.13	Grades (new grades posted)		
6.1.14	Communication Tools (new discussion posts, announcements)		
	<b>Activity Stream / What's New (viewed within the LMS)</b>		
6.1.15	Ability for users to view an aggregated list of course/organization/institution updates.		
6.1.16	User can sort/filter items by location (by course or organization)		
6.1.17	User can filter items by type (i.e. discussions, messages, content, grades)		
6.1.18	User can sort items by date, type.		
6.1.19	User can mark items as viewed		
6.1.20	User can click on an item to enter course and/or tool in which the item originated.		
	Please indicate which of the following areas are included in activity stream:		
6.1.21	Content (New content added, modified)		
6.1.22	Assignments (new assignment posted)		
6.1.23	Due date reminders		
6.1.24	Grades (new grades posted)		
6.1.25	Communication Tools (new discussion posts, announcements)		

## 6.2 Interface

Req #	Requirement	Y/N	Further Details?
	<b>General Interface</b>		
6.2.1	Provide proper validation and error handling when uploading files (i.e. not allow files with names containing non-alphanumeric characters). Should be consistent throughout the system, anywhere a file may be uploaded.		

6.2.2	Ability for system administrator to display a prominent notice on the homepage of each course.		
6.2.3	Ability for system administrator to enforce a pop-up notice the first time a user enters a course shell. User must 'agree' to continue.		
6.2.4	When uploading a file, anywhere in the course and by any user, enforce a step-through process where users have to select what kind of copyright permission they have for the file. The system needs to log what was selected and be able to retrieve that information for reporting purposes.		
6.2.5	Provide a descriptive warning when an item is to be deleted. (not just 'are you sure', but clearly indicating what is to be deleted)		
6.2.6	Ability for Instructors to simulate and see a student view of their course		
	<b>Text Box Editor (WYSIWYG)</b>		
6.2.7	Every part of the system using a text box should use the SAME WYSIWYG editor		
6.2.8	* The solution has WYSIWYG editing that allows standard formatting styles (e.g., heading styles, bullet lists, bold, italics, etc.)		
6.2.9	Provide spell check		
6.2.10	Provide equation editor		
6.2.11	* Ability to create web links		
6.2.12	oEmbed Compatible, to provide EASY embedding of content from applicable third-party systems (like Youtube, Vimeo, etc.).		
6.2.13	* Ability to attach and/or embed various media from various sources (images, videos, Youtube, etc.)		
6.2.14	Ability to paste from Microsoft Word and retain formatting		
6.2.15	* Ability to paste from Microsoft Word without affecting other elements of the page/course (we have experienced MS code breaking elements of the page)		
6.2.16	Ability to edit HTML source		
	<b>Search</b>		
6.2.17	Provide a course-wide search. Please indicate the areas included in course-wide search below.		
6.2.18	Content		
6.2.19	Assessments (Tests/Surveys/Assignments)		
6.2.20	Grades		
6.2.21	Groups		
6.2.22	Discussions		
6.2.23	Course Tools (please specify)		
6.2.24	Ability to search based on the contents of files uploaded to the course (not just titles and filenames)		

## 2.6.2 Non-Functional Requirements

### 1. Technical Requirements

#### 1.1 Platforms and Mobile Devices

Req #	Requirement	Y/N	Further Details?
1.1	<b>Platforms</b>		
1.1.1	* Your system must support commonly utilized Web Browsers current versions of: Microsoft Internet Explorer, Apple Safari, Mozilla Firefox, Google Chrome.		
1.1.2	List the software platforms and versions your support	N/A	
1.1.3	* Your system must support the latest commonly used platforms including Windows 7 & 8, Mac OS X		
1.1.4	To avoid many issues with java installations on client's computers, we ask that your system not use client side Java plugins. Can you comply with this?		
1.1.5	Does your system have support for multiple languages?		
	<b>Mobile Access</b>		
1.1.6	Ability to access full interface on the native browsers on mobile devices.		
	Provide mobile apps for common mobile devices. Please indicate the specific mobile Operating Systems on which you have produced apps below:		
1.1.7	Apple iOS		
1.1.8	Android OS		
1.1.9	Microsoft Windows Mobile		
1.1.10	Blackberry OS		
1.1.11	Blackberry 10		
1.1.12	Palm Web OS		
1.1.13	Provide mobile access free of any charges for students, and Instructors to access.		
1.1.14	Provide mobile access free of any additional charges for the institution.		
	Please indicate the areas of the system that are accessible via your mobile apps (not the native browsers):		
1.1.15	Announcements and Communication Tools		
1.1.16	Notifications		
1.1.17	Content		
1.1.18	Groups		

1.1.19	Assessments (Tests/Quizzes/Assignments/Grades)		
1.1.20	Virtual Meetings / Chat		
1.1.21	Calendar		
1.1.22	Provide ability for users to sync some areas of a course in the app for offline viewing. (Please describe)		
1.1.23	Provide ability for users to complete some tasks in the app when offline, and sync back to the course when online. (Please describe)		
1.1.24	Ability to quickly switch between course shells in mobile app.		
	<b>Offline Access</b>		
1.1.25	Does your LMS allow for working offline?		
1.1.26	If so, what features are supported for working offline? (e.g. content, grading, assessment, etc.)	N/A	
1.1.27	If so, will synchronization occur automatically?		

## 1.2 Standards and Compliance

Req #	Requirement	Y/N	Further Details?
	<b>Standards Compliance</b>		
1.2.1	* Your system must be able to support required volumes of class sizes of 5,000 active students or more and organizations of 50,000		
1.2.2	Provide the ability to scale the implementation for increased usage, more storage and users can be added		
1.2.3	Identify any limitation from a student or course perspective (daily usage, quota restrictions)		
1.2.4	System works/compatible with Ryerson technology infrastructure including network operating systems, technology stacks and other infrastructure requirements (Tier 1 platform)		
1.2.5	What components of the system's source code can be modified	N/A	
1.2.6	The solution is written in an industry-standard language.		
1.2.7	Meets the MS Interoperability standards ( <a href="http://www.imsglobal.org/specifications.html">http://www.imsglobal.org/specifications.html</a> )		
1.2.8	Meets the latest LTI Specifications ( <a href="http://www.imsglobal.org/lti/index.html">http://www.imsglobal.org/lti/index.html</a> )		
1.2.9	Ability to import SCORM or AICC packages (content and assessments), such as those created by Adobe Captivate or Articulate		
1.2.10	Ability to export SCORM or AICC packages (content and assessments), such as to Adobe Captivate or Articulate		



### 1.3 Hosting

Req #	Requirement	Further Details?
1.3	The following sections, Part 1 and Part 2, divide questions for proposed solutions that are to be hosted locally at Ryerson University (part 1) vs. hosted by the supplier (part 2). Please provide answers only for the solution you are proposing. If you are proposing both, please answer both Part 1 & 2.	
<b>Part 1</b>	<b>RU Hosted: Recommended Infrastructure for locally hosting the LMS</b>	
1.3.1	Should Ryerson elect to host the LMS in-house, identify and describe the recommended server hardware and software specifications required to run the LMS in the University's environment	
1.3.2	Please specify any Ryerson resources required to support your solution in-house (number of people, technology, etc.)	
1.3.3	What is your response time performance (based on: 2,854 course shells, class size potentially reaching 5,000 active students, current peak usage around 300 hits/sec (atomic HTTP requests))	
<b>Part 2</b>	<b>Hosted Solutions: Supplier hosted</b>	
1.3.4	Would you provide RU with our own separate set of instances for: testing, and development in addition to production?	
	<b>Redundancy, Back-ups and Deletion</b>	
1.3.5	Describe your backup and restoration process/ capabilities. Do you regularly test your backup infrastructure?	
1.3.6	Can RU dictate when back-ups occur (example: to align with our course schedules)	
1.3.7	Is back-up media stored off-site? Are they encrypted? List your encryption standard.	
1.3.8	Would RU have the capability to do our own restores when needed (such as an instructor accidentally deleted test, grades, etc.)	
1.3.9	Describe your failover capabilities and any disaster recovery options.	
1.3.10	How are application, database, and supporting server and infrastructure resources provisioned during peak load?	
1.3.11	Please describe your data destruction procedure and the length of time it takes for data to be 100% purged from the system.	
1.3.12	Do you retain any Ryerson data for any other purpose and if so please describe.	
	<b>Maintenance</b>	
1.3.13	Identify your required maintenance schedule and impact to our system availability	
1.3.14	Identify network requirements to ensure access to the hosted LMS, for our administrators working both on-campus (campus network infrastructure requirements) and connecting from off campus	
1.3.15	What is the process for increasing capacity to the application, should our needs grow faster than expected?	
1.3.16	What is your response time performance (based on: 2,854 course shells, class size	

	potentially reaching 5,000 students, current peak usage around 300 hits/sec (atomic HTTP requests))	
	<b>Server location</b>	
1.3.17	Do you offer the option to have a solution completely hosted within Canada? State where.	
1.3.18	What guarantees does your company offer that data will be stored in jurisdictions that have internationally-recognized privacy or data protection laws or frameworks?	
	<b>Access Control</b>	
1.3.19	Do you have access control policies for your employees to ensure RU's assets are properly protected against unauthorized access?	
1.3.20	* Is Ryerson's data segregated from the data of your other clients? If so, how? (describe your standard).	
1.3.21	Is data transmitted over authenticated tunnels? Not just encrypted tunnels but (mutually) authenticated ones.	

#### 1.4 Application Integration

Req #	Requirement	Y/N	Further Details?
1.4	<b>Application Integration Requirements</b>		
	Please refer to Ryerson Learning Management and Related Systems and Services listed in Section 2.4. in this RFP		
1.4.1	* Supports integration with other Systems or 3rd Party Applications, i.e. supports open standards, including LTI and and provides a rich API. Describe.		
1.4.2	* Supports interoperability with other Systems or 3rd Party Applications. Describe.		
1.4.3	* Supports web services, APIs, LTIs, real-time synchronization, and batch processes. Describe.		
1.4.4	Can you guarantee the stability and reliability of the API and LTI? Describe how changes are managed.		
1.4.5	Manages the access to the API and LTI. Please describe.		
1.4.6	Provides an SLA for the API or LTI component for integration with third-party software.		
1.4.7	Provide API to pull announcements, what's new, list of courses for users. For example to post in Ryerson's portal		
1.4.8	Provides full integration with Google Apps for Education, i.e. not just SSO integration, allows in-line viewing, editing, and real-time collaborating to and from Google Drive, Google Calendar and Google Groups.		
1.4.9	Provide API to enable real-time integrations (i.e. simulations), for use in synchronous tools such as virtual meetings.		
1.4.10	Provide the ability to integrate with specific resources from within the LMS. Example from viewing grades in RAMSS to viewing grades in the LMS		
1.4.11	Provide APIs that support server side Java function calls (not remote procedure calls via REST or Web Services)		
1.4.12	If an operation cannot be performed through the API, what mechanisms are in place for RU to achieve the functionality	N/A	

1.4.13	Have you published your APIs provided and what is the URL, or provide API documentation with your proposal.		
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## 1.5 Identity Management Integration

Req #	Requirement	Y/N	Further Details?
1.5	<b>Integration with Identity Management System</b>		
	The LMS must be integrated with Ryerson's Identity Management system. It is imperative that account management including the creation, modification, disabling, and deleting of accounts, roles, user groups, programs of study, course shells, and course shell registrations be managed by Ryerson's Identity Management System. We would also like the capability to structure our courses into a hierarchy that can be grouped into course, program/department, Instructors, etc.		
1.5.1	* Do you have real-time APIs in your LMS to provision user accounts including create, re-activate, deactivate and delete user accounts		
1.5.2	* Do you have batch process to provision user accounts including create, re-activate, deactivate and delete user accounts		
1.5.3	Do you have secure protocols in place for data transfer between our Identity Management System and the LMS for both real-time API and batch process		
1.5.4	Does your system automatically purge deleted accounts including user related content?		
1.5.5	If not automatically, are there APIs available to do the purge		
1.5.6	Do you have APIs to support username changes?		
1.5.7	What cryptographic hash function is used to protect stored user, administrator, and system passwords?	N/A	
1.5.8	RMS, Ryerson's Identity and resource management system, provision courses in an LMS. Ryerson would like to structure our courses into a hierarchy that can be grouped into course, program/department, faculty, etc. Do you have a <b>real-time</b> API for RU to provision the hierarchy accordingly? Example: courses creation, course enrollment (Instructors, students, TAs, etc.), deactivation, deletion, reactivation, and copying of courses?		
1.5.9	Ryerson would like to structure our courses into a hierarchy that can be grouped into course, program/department, faculty, etc. Do you have a <b>batch</b> process API for RU to provision the hierarchy using our RMS? Example: courses creation, course enrollment (Instructors, students, TAs, etc.), deactivation, deletion, reactivation, and copying of courses?		

## 1.6 Authentication

Req #	Requirement	Y/N	Further Details?
1.6	<b>Authentication</b>		
1.6.1	Is your system CAS (Central Authentication Services) enabled? ( <a href="http://www.jasig.org/cas">http://www.jasig.org/cas</a> )		


1.6.2	* Does your system support SAML?		
1.6.3	In terms of your service's web interface, is the logout customizable so that Ryerson's systems are notified in real-time that the user has logged out? For example via a redirect to CAS or via other methods?		
1.6.4	Can we customize the logout process? For example, if an end user logs out of Ryerson's portal, CAS, or other system and we want to also log the end user out of the LMS		
1.6.5	Can the logout button in your services be hidden if the LMS is being used within Ryerson's portal?		
1.6.6	Ability to disable the local login		
1.6.7	Do you support CAS web authentication for your mobile app?		
1.6.8	Provide the ability to configure the session timeouts		
1.6.9	Ability to dynamically authorize permissions by role to a user upon authentication		

## 2. Implementation and Migration Strategy

Req #	Requirement	Details
2.1	<b>Implementation and Migration Strategy</b>	
2.1.1	Describe your plan for implementing the LMS, include approximate time lines, roles, vendor responsibilities and the resources, what would be involved in migration data from our current Blackboard learn 9.1 SP8 (it may upgrade to SP13 in 2014) to the new LMS, with 400GB database and 3.5TB content. Describe the LMS hardware/software configuration, e.g. web server, app server and DB server, application/database versions etc. Estimate downtime with migration.	

## 3. Scalability and Performance

Req #	Requirement	Y/N	Further Details?
3.1.1	Do you implement paging between the application server and database for large queries? (This means the database does not have to return all records to the application server. This is NOT a question about paging between the application server and the client.)		
	State whether or not the following features are fully functional and can be used effectively when a course or organization has 50,000 registered students:	-	-
3.1.2	Gradebook		
3.1.3	Notifications		
3.1.4	Assessments (Tests/Quizzes/Assignments/Grades)		

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3.1.5	Virtual Meetings / Chat		
	State whether or not the following features are fully functional when a course or organization has 500,000 registered students:	-	-
3.1.6	Gradebook		
3.1.7	Notifications		
3.1.8	Assessments (Tests/Quizzes/Assignments/Grades)		
3.1.9	Virtual Meetings / Chat		

### 2.6.3 Accessibility Compliance

#### 1. Accessibility Compliance

##### Features that enable access of the course/system to the whole community

Req #	Requirement	Y/N	Further Details?
1.1	Accessibility Compliance		
1.1.1	Can your company document the conformance of your system to the World Wide Web Consortium (W3C) WCAG 2.0 guidelines Success Criteria Level AA? Indicate Yes / No / N/A and explain. Refer to: <a href="http://www.w3.org/TR/WCAG20/">http://www.w3.org/TR/WCAG20/</a> . Please provide your company's accessibility statement.		
1.1.2	If your answer is No: a) describe the undue burden, i.e., the significant difficulty or expense incurred, in order to comply with the WCAG 2.0 standard. If the monetary expense is a basis for the undue burden, explain the costs and how they were estimated. Be sure to quantify the effort in time and money to make the proposed system/resource compliant; b) Describe the insufficient resources available to the office or program for which the product(s) or service(s) is/are being acquired. If technical difficulty is claimed, describe and document such difficulties.	N/A	
1.1.3	If you answer is Yes, describe the methodology used to ascertain conformance.	N/A	
1.1.4	Perceivable: Does your LMS provide text alternatives for any non-text content and components so that it can be changed into other forms people need, such as large print, braille, speech, symbols, or simpler language?		
1.1.5	Perceivable: Does your LMS provide alternatives for time-based media?		
1.1.6	Perceivable: Can your LMS create content that can be presented in different ways (for example simpler layout) without losing information or structure?		
1.1.7	Perceivable: Does your LMS make it easier for users to see and hear content including separating foreground from background?		
1.1.8	Operable: Does your LMS make all functionality available from a keyboard?		
1.1.9	Operable: Does your LMS make all functionality available from a keyboard?		

1.1.10	Operable: Does your LMS prevent the design of content in a way that is known to cause seizures?		
1.1.11	Operable: Does your LMS provide ways to help users navigate, find content, and determine where they are?		
1.1.12	Understandable: Does your LMS design (aside from content being provided/uploaded/created by users) make text content readable and understandable?		
1.1.13	Understandable: Does your LMS design/interface appear and operate in predictable ways?		
1.1.14	Understandable: Does your LMS help users avoid and correct mistakes?		
1.1.15	Robust: Does your LMS maximize compatibility with current and future user agents, including assistive technologies?		
1.1.16	Please describe in detail how you ensure accessibility is built into your proposed solution from the standpoint of your product release cycle.	N/A	
1.1.17	Does your company have the relevant experience of applying the principles of ICT accessibility that create solutions that are accessible to the widest number of users, including users with disabilities?		

## 2.6.4 Support and Services

### 1. Support and Services

#### 1.1 Support

Req #	Requirement	Y/N	Further Details?
1.1	<b>Support</b>		
	Our community of end users rely on our system administrators and our IT help desk staff to be the key point of contact for resolution of support issues. It's also important that we have access to tools and resources to be able to provide timely and effective support to our end users. Please outline how your service will align with these needs by answering the following:		
1.1.1	Describe your support framework (including support issue-tracking and escalation procedures), response method, what estimated response time for every level of issues. Provide performance statistics over the past 3 years to support your estimated response time.	N/A	
	Is support offered to our system administrators in the following ways? Include the hours of availability for each and response time		
1.1.2	Email Support		
1.1.3	Telephone		
1.1.4	Online help menus		
1.1.5	Online forums with qualified moderators		
1.1.6	Live chat assistance		

1.1.7	Is there a dedicated support contact(s) individual(s) assigned to Ryerson (include details and the hours of availability)		
1.1.8	Describe what tools are available to the end users for support	N/A	
	<b>Change Management</b>		
1.1.9	How do you communicate with your clients about system-status changes, upgrades and problems	N/A	
1.1.10	In regards to a hosted solution, will we have information available to us on current system status and performance	N/A	
1.1.11	Describe your process when we request changes, enhancements or customizations. Include turnaround time, cost factors, etc.	N/A	
1.1.12	Describe your upgrade process including support during and after the upgrade	N/A	
1.1.13	Do you have change control procedures in place to notify our system administrators about scheduled downtime for maintenance or upgrades?		
1.1.14	Please describe the way in which feature enhancements and upgrades are released to your product in both self-hosted and vendor hosted models. Will Ryerson have a chance to evaluate new features before they are released? How will our system administrators and our end users be notified of upcoming scheduled releases or updates product features? Do our system administrators have the choice to delay or opt out completely of a new feature roll out or upgrade before it's released if we deem it inappropriate for our end user community? Please explain how our options work.	N/A	
	<b>Online Support</b>		
1.1.15	Do you have a repository of online tutorials (text-based and short videos) and searchable web-based help content.		
1.1.16	Provide links to online support pages from any location/tool in the system? (example: When a user is on a page, anywhere in the system, a help link is visible on that page and will take the user directly to the specific topic page, and not to the general help page.)		
1.1.17	Provide the ability to allow user to run a system check on their own computer to verify their computer/web browser compatibility and settings.		
1.1.18	All error messages (including system messages) should be plain language and provide details that can be used in troubleshooting.		

## 1.2 Training Documentation

Req #	Requirement	Y/N	Further Details?
1.2	<b>Training and Documentation</b>		
1.2.1	Will you provide complete training and help materials for RU system administrators as well as for RU help desk professionals for end user assistance. (The number of administrators and help-desk professionals that should be provided with training materials will be determined by RU and shared with the Supplier)		
1.2.2	Will you offer training live training options (such as live demos, live training sessions)		

1.2.3	Describe your ongoing training model (hosted)	N/A	
1.2.4	Describe your ongoing training model (non-hosted)	N/A	

## 2.6.5 Data Security and Privacy Protection

Req #	Requirement	Y/N	Further Details?
<b>1.1</b>	<b>Information Security and Privacy Policies and Practices</b>		
1.1.1	* Do you have a current and formalized information security policy? Is it published and publicly accessible? Please provide for review.		
1.1.2	* Do you have a current and formalized privacy, data protection, or related policy that protects client data, specifically personal information? Is it published and publicly accessible? Please provide for review.		
1.1.3	* Do you implement recognized information security standards and practices in your application development and operations? Please list and describe.		
1.1.4	Do you ascribe to international privacy standards? Please list them.		
1.1.5	* Do you have procedures and controls in place to protect Ryerson's and your own organizational assets, including information, software and hardware? How are they implemented and monitored/enforced?		
1.1.6	* What are the terms of your SLA? Make sure to provide SLA details for the following: uptime, security incident resolution procedures, outages and business continuity management. Please specify timeliness of client notification and handling of a security incident, measures that may be taken for incident containment, and cooperation in incident investigation and resolution.	N/A	
1.1.7	Would you permit Ryerson to run its own vulnerability scans against your product?		
1.1.8	* Are you subject to regular security audits or assessments (preferably conducted by a third party), such as Threat and Risk Assessments (TRAs), vulnerability assessments, code review, or service/operational audits such as SAS 70, SSAE 16, Uptime Institute Tier certification? What were the audit findings? Have the audit findings been mitigated in a timely and effective manner? How were the mitigation actions validated? Can you provide any evidence or attestation of compliance or certifications attained?		
1.1.9	Ryerson is subject to Ontario's Freedom of Information and Protection of Privacy Act ("FIPPA"), which contains requirements about protecting clients' personal information, providing notice about the collection, use, and disclosure of personal information. Please explain how you have supported other Post Secondary clients' ability to comply with Privacy and Data Protection Legislation (and other regulatory requirements). Examples from Ontario would be preferable.	N/A	
1.1.10	Does your system utilize any third party products or subcontract to third party service providers? If yes, what are the liabilities and responsibilities of the third party as they impact Ryerson in the event of an incident or breach.		
1.1.11	How do you ensure the integrity of your software and information against malware and other harmful, unauthorized mobile code?	N/A	
	<b>User Profiles and Privacy</b>		



1.1.12	According to the Privacy by Design Principles, (see “Definitions”) if a user profile feature is available in a system, the default setting of the profile is “Private.” Can the System Administrator accomplish this?		
1.1.13	Does your LMS allow users to control and configure the visibility of their profiles, including what to share or not share? How granular are the access controls?		
<b>Monitoring and System Logging</b>			
1.1.14	For a hosted solution, what are your safeguards to determine whether there has been any compromise of the relevant assets? (e.g. loss or modification of information, software and/or hardware)	N/A	
1.1.15	Are system events logged with sufficient information to ensure traceability to a unique individual or system?	N/A	
1.1.16	For a hosted solution. what is the scope of your logging and monitoring	N/A	
1.1.17	System logs all actions/creates audit trail on documents and preserves user work history even after user is removed	N/A	
1.1.18	Are system logs visible and searchable in administrative GUI	N/A	
1.1.19	Please describe how your logging infrastructure adequately protected against unauthorized tampering	N/A	
<b>Network Security Management</b>			
1.1.20	How is data in transit secured over untrusted networks such as the Internet?	N/A	
1.1.21	If hosted locally at Ryerson, what network requirements for hosting this at RU, e.g. firewall changes, ports opened, etc.	N/A	
1.1.22	Describe whatever OSI layer protocols used in your solution, particularly to secure data transfer. Include protocol names, versions and identify the uses.	N/A	

## 2.6.6 Use Cases

The following section describes various scenarios common to Ryerson University. Please describe how your system achieves the following. Illustrating the steps or processes in detail.

#	Use Cases
1	<p><b>Calendar &amp; Scheduling Use Case:</b> A professor wishes to add significant events to the online course calendar. The events include assignment release and due dates, extra test preparation seminar dates at times that are not in the official course schedule, test dates, and events that advise students when they should begin working on various stages of an assignment.</p> <p>In some cases a course shell may include multiple course sections – each with different dates for each event. Students should only see the events relevant to their section.</p> <p>In other cases individual students may wish to create events in their own course calendar.</p> <ol style="list-style-type: none"> <li>1. Describe in detail the options, and any required workarounds, to accommodate all of these scenarios in your system.</li> <li>2. Describe the options and any required workarounds to share this information with the student's Ryerson Google calendar. Make sure you include as one option how a Google secondary calendar for the course could be populated and made visible to the student.</li> <li>3. Ryerson already populates student's primary Google calendars with course schedule information. If Ryerson wanted to ensure that the information provided by the LMS would not duplicate this information in a secondary Google calendar but did want the information in the LMS course calendar, how would that be accomplished?</li> </ol>
2	<p><b>Course and User Management Use Case</b> Some larger classes can be taught by multiple instructors and each of these instructors may be responsible for one or more of the sections. There is usually one instructor who is designated as the course co-ordinator, responsible for overall matters of the course.</p> <p>An ideal scenario would be the capability to set up one overall master course that all students, teaching instructors and TAs can have access to, where general announcements, outlines, documents that apply to all sections could be posted once. Then depending on the section number or assigned level/role, a student/instructor/TA would also have access to section specific material.</p> <ol style="list-style-type: none"> <li>1. Describe in detail how the above scenario could be accomplished in your system including any recommended workarounds.</li> <li>2. Describe if and how this would also apply to the gradebook so that TAs or instructors would only have access to the sections assigned to them within the gradebook.</li> </ol>

3

**Tests and Test Banks Use Case**

It's imperative that instructors have a clear and easy to use interface to create tests and deploy them to students. An instructor teaching a flipped version of a course has weekly online quizzes and weekly submissions of in-class assignments for students. There are multiple sections of the course, which means there are multiple deadlines for everything. One common complaint we hear is faculty have to duplicate all of their quizzes and assignments for each course section that they teach.

1. Explain the process for how an instructor could upload their existing tests into your system
2. Explain how the instructor would go about creating online test banks/pools in your system by describing the workflow: how many steps are required for an instructor to create and deploy a test to students in your system.
3. Explain how your system would allow the instructor to reuse the quizzes for multiple sections they are teaching without having to post duplicates of the quizzes and assignments for each section.
4. Explain how the instructor could share quizzes and course materials with other instructors if they chose to do so.
5. Explain how the instructor could also then use the materials in another course (example, copy capabilities?)
6. Explain how the solution to questions 1-5 above handles access control and permission to the copied quizzes.

4.	<p><b>Grading Use Case</b> One of the most popular features for instructors using an LMS is the Gradebook. Our instructors demand a flexible and easy to use Gradebook in an LMS.</p> <p>A) Explain the ways that instructors can go about creating a new column for grades and what properties can be customized for the column.</p> <p>B) Instructors need to be able to make changes to the Gradebook, explain how an instructor would do the following in your system:</p> <ol style="list-style-type: none"> <li>1. How many steps does it take to reorganize column order (i.e. once the instructor is in the Gradebook). If applicable, explain how robust the system is for handling dynamic column numbers.</li> <li>2. Explain whether it's possible and how an instructor batch creates multiple columns in the Gradebook.</li> <li>3. Describe the steps required once the instructor is in the Gradebook, for the instructor to copy columns and edit the copied column's settings.</li> </ol> <p>C) Our instructors need to be able to keep track of the graded columns that they assign weights to and ensure they do not go over 100%. They would like to assign weights to grade columns as they are created but not apply the weight calculation until the final grades get calculated. Explain how your system's grade book can help them achieve this.</p> <p>D) Many instructors use the LMS Gradebook to manage interim grades and calculate final grades. Explain your LMS Gradebook integration with the Student system that will allow instructors to export the calculated final grade from the LMS Gradebook to the Student system, which in Ryerson's case is PeopleSoft Campus Solutions.</p>
5.	<p><b>Virtual Meetings Use Case</b> As part of a course requirement, a student has the responsibility to facilitate a weekly tutorial in which a case scenario will be presented and the group of other students and the instructor participate in the discussion of the case. The tutorial is held online as the students are out in various locations for their work-study positions.</p> <p>The facilitating student must upload the case presentation file for the class and prepare an agenda for the tutorial that should be shared with the class. The tutorial involves discussion with other students, where students must raise their hand to participate. Students may be participating in this online tutorial using either a PC, MAC, or mobile device such as a smartphone or tablet.</p> <ol style="list-style-type: none"> <li>1. Explain what the instructor would need to do to allow students to facilitate this type of online interactive tutorial session. This may include session setup, scheduling students facilitators, providing the facilitator role, etc.</li> <li>2. Describe how the student leading this would prepare for their tutorial and discussion. Walk through the steps for posting the agenda, presentation (e.g.</li> </ol>

	<p>PowerPoint slides), or any other course materials that may need to be shared.</p> <ol style="list-style-type: none"> <li>3. Describe how the student facilitates the discussion with the other students, including calling on other students who raise their hands in an orderly fashion.</li> <li>4. Describe how students who are using a mobile device can participate in the tutorial. Will their experience be the same as those participating using a computer?</li> <li>5. How will the instructor provide comments and feedback to the student facilitator on the presentation. This may include the availability of tools that can do markups, annotations, rubric, etc. Describe the LMS' capabilities, if applies, of providing feedback during and after the presentation.</li> <li>6. How will the instructor assess this activity? Is there any integration with an assessment and/or grading tool (e.g. rubrics, gradebook column)?</li> </ol>
6.	<p><b>Assignments, Groups, Integration and Grading Use Case</b></p> <p>An instructor has created an assignment stored in a Microsoft Word document format. The instructor wants to upload this assignment, assign it to groups randomly in each of the 3 course sections she manages. Each section has a different due date. One of the group members (it doesn't matter who) must submit the assignment on time on behalf of their group. The instructor will grade the assignment submissions, provide markup/annotation comments, provide recorded audio feedback, and then release them back to the groups. Finally the instructor will post the class average on the assignment so the students know where their group stands.</p> <ol style="list-style-type: none"> <li>1. Describe in detail how the instructor could upload and post the assignment in the LMS.</li> <li>2. Describe how the instructor creates random groups of N number of students per group where each group membership needs to be from the same course section.</li> <li>3. Describe how the instructor will assign the assignment to these groups.</li> <li>4. Explain the options to notify student's about the assignment and include the due dates for each course section. These due dates should also be posted on the course calendar.</li> <li>5. When the instructor is grading the assignment, can they see the following <ol style="list-style-type: none"> <li>a. the list of the group members,</li> <li>b. the date that group submitted the assignment, and</li> <li>c. any other summarized details that would be useful to an instructor?</li> <li>d. describe the options and details your LMS has to help the instructor in this scenario.</li> </ol> </li> <li>6. Explain how your system allows the instructor to mark up the assignment, provide feedback on the assignment, release it back to the students and allow for all members of the group to see this feedback.</li> <li>7. Will the grades get automatically assigned to all students in the group or does the instructor have to enter the grade to each students one by one? Can the instructor</li> </ol>

	<p>configure when the students will be able to see the grades?</p> <p>8. Ryerson adopted Google Apps one year ago including Drive, Calendar, and Gmail. If the assignments were created in Google Docs, what would be your system's advantages and limitations, if any, for handling the above scenarios?</p>
7.	<p><b>Course Management Use Case</b>  Ryerson University course offerings are often, but not exclusively, offered as sections that belong to courses, which in turn are part of a program, that are offered by a department within a faculty. Course shells may contain students in more than one course section.</p> <p>1. How does your system facilitate sharing of content within a course shell that is common to:</p> <ul style="list-style-type: none"> <li>a) the university</li> <li>b) a faculty</li> <li>c) a program</li> <li>d) a course with more than one section</li> <li>e) a multidisciplinary course from more than one program, or more than one faculty</li> </ul> <p>2. Within your application can user progress be tracked in all the course shells a student has taken within:</p> <ul style="list-style-type: none"> <li>a) the university</li> <li>b) a faculty</li> <li>c) a program</li> <li>d) a customized grouping of courses</li> </ul>
8.	<p><b>Social Learning/Online Communities</b>  Communicating, collaborating, and sharing online have become necessities for students nowadays. Whether they are distance education students, part-time students, or full-time on campus students, the online community is an integral part of the students' engagement with the program, with the courses they are taking, with instructors, and with their peers.</p> <p>1. How does your LMS support these social/informal learning processes?</p> <p>2. How does your LMS protect its users against the security and privacy risks of social media integration. Please elaborate your strategies.</p>
9.	<p><b>e-Portfolio</b>  There are various objectives for an instructor or a department looking for a e-Portfolio system for students. Examples:</p> <p>1. The student career centre is looking for a system that will allow students to create portfolios to document and showcase their course work and work experiences, and eventually for them to be able to share the portfolio electronically with prospective employers;</p> <p>2. A program study in a school/department is guiding the students in documenting their</p>

	<p>reflections on learning during their studies from first year to graduation;</p> <p>3. The HR department needs a system where staff can access and maintain their profiles which contain job roles, responsibilities, skills, experience, education, qualifications, etc, as well as managing staff's career management, performance reviews, and goal management.</p> <p>It is important to have appropriate access management for the portfolios and profiles, and for each user to be able to configure what they would want to share and not share with others.</p> <ul style="list-style-type: none"> <li>Please explain how your LMS would support the e-Portfolio objectives above.</li> </ul>
10.	<p><b>Multi-stage Group Work and Peer Assessment</b></p> <p>Ryerson needs a flexible approach to managing and structuring peer assessment processes in its course delivery tools. For example, an instructor may choose to implement the following scenario:</p> <ul style="list-style-type: none"> <li>Students in a course or course section are divided into small teams/groups that produce a written product such as a series of blog posts that represent the marketing campaign for a product.</li> <li>Each individual in the course is then <i>assigned through the LMS</i> to write an assessment of another team's work.</li> <li>Students are designated to assess a specific assignment by the instructor.</li> <li>The assessments are provided back to each team so they can improve their marketing material and upload their revised work as a second group assignment.</li> <li>The assessments are then marked by the instructor.</li> <li>The instructor needs access to the original draft written work, the assessments, and the revised written work. Grading is done as follows: <ul style="list-style-type: none"> <li>Draft Written Work - Group assignment - group grade. (In Blackboard, there is a grouping feature that lets the instructor see one assignment and give one mark for a group.)</li> <li>Assessments - Individual assignment - individual grade. The instructor needs access to both the Draft and the assessment as a pair to mark the assignment.</li> <li>Revised Written Work - Group assignment - group grade.</li> </ul> </li> <li>Grades are entered through the assignment marking function and appear in Grade Centre.</li> </ul> <p>Describe in detail how your software can accommodate these requirements and what workarounds - if any - are necessary to fully implement this scenario. Please also state how students who drop a course and therefore leave a group are managed.</p>
11.	<b>LIBRARY USE CASES</b>

11.1.	<p><b>Application Integration and Content Use Case</b></p> <p>Recent research has shown that students are better served if Library resources and services are available to them at point of need (i.e. without leaving their course in the LMS). The Library resources and services would like to have the following be available from the LMS:</p> <ul style="list-style-type: none"> <li>• The Library’s home-grown research guides which contain links to recommended sources on a subject basis, but will evolve to contain embedded multi-media, interactive widgets, social media and RSS feeds.</li> <li>• The Library’s home-grown and third party online tutorials for a variety Library-related activities and skills, such as embedding e-Reserve readings, posting basic assignment help and literacy skills information.</li> <li>• The Library’s chat reference service hosted by a third party where students can chat with a Librarian to get help with assignments and research and information about library services.</li> </ul> <p>Integration of the above resources and services should be take place at several levels:</p> <ol style="list-style-type: none"> <li>a. in the LMS system as a whole (ie. available to all students),</li> <li>b. at a program or faculty level (ie. all civil engineering courses) and</li> <li>c. on a course level – specific to one course</li> </ol> <p><b>Explain:</b></p> <ol style="list-style-type: none"> <li>1. how your LMS would facilitate the above scenario</li> <li>2. how your LMS would integrate with the resources and services in the above scenario</li> <li>3. the steps a library staff member would need to perform to embed a research guide, an e-reserve reading, tutorial or chat widget in a LMS course. If the procedure is different for each type of resources, please indicate.</li> <li>4. Outline how an instructor would integrate these resources in an individual course or group of courses.</li> <li>5. how a student can build a personalized “toolbox” of Library Resources and Services appropriate for his/her needs within the LMS.</li> </ol>
11.2.	<p><b>* Copyright Compliance Use Case</b></p> <p>One of Ryerson’s objective is to ensure that all resources (documents, images, videos, etc.) used in the LMS comply with the copyright legislation.</p> <p>Despite recent changes in the copyright landscape that have resulted in greater flexibility for educational institutions regarding copyright, there is still a need for vigilance in matters of copyright particularly within the LMS. The AUCC (Association of Universities and Colleges of Canada) has recommended a two-step process to ensure copyright compliance:</p> <p>A) When each new course is created for a faculty member, the AUCC recommends that faculty members click through a copyright form indicating that they are aware of copyright implications of</p>



posting material to their course. Similarly every student at the beginning of every LMS course needs to click through a copyright awareness form.

B) For faculty members, a second check on copyright compliance needs to be performed each time a new reading or other material is uploaded to the LMS. The faculty members have to indicate what copyright authorization they have for the uploaded materials. For courses that are cloned (copied from one year to the next) the same check needs to be done for each of the readings or other materials.

In these two instances, a record of both metadata and the information gathered via these forms needs to be maintained so it can be used to answer questions such as “Did Faculty member X indicate that material Y for course Z was cleared for copyright and on what date?”

- **Response to this question is mandatory:** Outline how your LMS’s copyright compliance module meets these criteria. If there is no such module, how do you propose to meet the AUCC’s two-step copyright compliance recommendations, maintain this information and synchronize it with a third party product.

**12. HUMAN RESOURCES USE CASES**

**12.1. Integration and Identity Management Use Case**  
On a new employee’s first day he receives an automatically generated email informing him of mandatory courses that he needs to complete as part of the offer of employment. The email provides a link to sign onto the LMS and a deadline for completion. When a deadline approaches, a reminder is sent to the employee for any incomplete courses.

1. Describe whether your system can be configured to trigger enrollments when new employees are hired. Personnel records are maintained in PeopleSoft, system accounts are maintained in the Identity Management System (RMS).

**12.2. Enrollment and Tracking Use Case**  
An employee logs onto the LMS and sees a personal dashboard where he is able to see courses completed, in progress or have been enrolled in but not yet completed. He is able to see both employee development courses as well as credit courses. The employee would also be able to search through a catalogue or listing of employee development courses and enroll in any that are available to him. Upon enrollment, an email is sent to his manager to authorize the registration. If there is a conflict in the employee’s schedule after registering for the course, he would be able to de-register up until a week before the session date.


1. Describe how the scenario above will be achieved with your LMS. If third party systems or customization needs to be brought in, please list those and what they do as well.

2. Can the LMS System Administrator select a subset of courses to be included in the

	<p>catalogue which will be viewable to all employee (everyone with a staff role, not students)? This means other courses not in this subset should not be listed in the catalog.</p> <ol style="list-style-type: none"> <li>3. Describe how self-enrollment and subsequent course enrollment is managed in your LMS.</li> <li>4. In case of self-enrollment, describe how the LMS allow an admin to limit the number of enrollment in a particular course, and how the LMS manages a waiting list when the limit has been reached.</li> <li>5. Does your LMS have the ability to trigger emails to be sent automatically from a course to a designated recipient (e.g. instructor, Manager, HR rep) where self-enrollment is enabled, when a new enrollment happens? If so, please provide the details of how this is accomplished.</li> <li>6. Does your LMS has the ability to manage course completion and generate a report of completion? Does your LMS has the ability to generate transcript, i.e. list of completed courses, for each course participants?</li> <li>7. Does your LMS has certification management feature, including notifications and tracking of certification deadlines, expiration dates, and versions? In regards to certification, does the system provide time stamped e-signatures and auditing trails, certification paths (e.g. equivalent courses for the certification)?</li> </ol>
12.3	<p><b>Human Resources Use Case</b>  RU Human Resources department needs to have an LMS that supports features which are not typical in a university curriculum, such as course catalogues, self-enrollment and Manager/Supervisor approval of enrollment, participants progress tracking and issues certificate of completion, course pre-requisite tracking, list/unlist courses to be offered, a mechanism to inform registrants if a course is cancelled, etc. How can HR leverage the features of your LMS to achieve these objectives?</p>
12.4.	<p><b>Course Management and Inter-course adaptive release Use Case</b>  A manager decides that one of her employees would benefit from taking the Lead Hand program offered by HR. This program consists of a series of workshop and seminar sessions that take place throughout a particular term. On the LMS, the employee can enroll into the program and will in turn be enrolled into each constituting course. As the employee progresses through the program, an administrator (or course owner) would be able to indicate completion of individual courses. For missed courses, employees would be reminded to enroll into the next installation of that course so that they remain eligible for a certificate of completion for the program.</p> <ol style="list-style-type: none"> <li>1. Describe how your LMS will group courses together to form the curriculum for a program. If third party systems or customization needs to be brought in, please list those and what they do as well.</li> <li>2. Can the LMS system administrator configure who will be able to add (enroll) students into a course and be able to see who added whom? If this is possible, does your LMS allow for a condition to be imposed before adding (enrolling) a user in a course takes place, such as an email authorization?</li> </ol>

12.5.	<p>In order for an employee to maintain her accredited certification in her field, she must complete designated courses at certain intervals, (i.e. every five years course 'x' must be taken). When the employee logs into the LMS she is able to see the courses that are required to maintain her certification as well as dates when they need to be repeated/renewed.</p> <ol style="list-style-type: none"> <li>1. Describe how your LMS will record each employee's certification requirements and notify them accordingly when anything is due for renewal. If third party systems or customization needs to be brought in, please list those and what they do as well.</li> </ol>
12.6.	<p><b>Analytics Use Case</b> The Ministry of Labour informs Ryerson that it will be conducting an audit to ensure that all Ryerson employees have been adequately trained in the relevant areas of workplace safety. Administrators need to produce an up-to-date report showing completion records for all mandatory Health and Safety courses. This report would identify employees, the relevant courses according to their position and the completion date of these courses.</p> <ol style="list-style-type: none"> <li>1. How does your LMS track and store course completion records?</li> <li>2. What reporting capabilities does your LMS have to generate the requested report above and other reports, such as a list of employees who have not completed the required courses and their progress?</li> </ol>
12.7.	<p><b>Reporting and Analytics Use Case</b> At year end, HR needs to report on all the employee learning course and programs that were delivered during the year. An Administrator logging into the LMS would be able to generate reports on the number of courses that were offered, any courses that were cancelled and the reason for the cancellation, the attendance in each course, the attendance trends for the same course year-over-year and a consolidated summary of course ratings.</p> <ol style="list-style-type: none"> <li>1. Describe how your LMS will produce the reports for these statistical and analytical needs. If third party systems or customization needs to be brought in, please list those and what they do as well.</li> <li>2. Would the report be in a format that allows for further analysis, such as raw data and spreadsheets?</li> <li>3. If we need to send out course satisfaction surveys and receive answers anonymously, how would this be accomplished in your LMS?</li> </ol>
12.8.	<p>A manager decides that for professional development, one of the internal courses offered by HR would benefit his team. Besides scheduling an appropriate time for the team session, he also notes the resource costs associated with holding the session and checks his budget to ensure there are adequate funds.</p> <ol style="list-style-type: none"> <li>1. Describe how your LMS will allow calculation of material and resource costs for each course.</li> </ol>

	<p>2. What API does your LMS provide, if any, to integrated with a Financial System to provide the ability for the Manager to invoke a budget transfer process?</p>
12.9	<p><b>Competency Management Use Case</b>  Departments such as H.R. and schools, such as Engineering are interested in building and maintaining competency libraries in the LMS where they can define individual competencies with a name, description, proficiency scale, and behaviour descriptors and categorize competencies . In the case of the Faculty of Engineering, having this capability can aid in an accreditation process whereas HR is interested in maintaining a database of competencies for many employment positions. Please indicate if your LMS can provide this functionality, and if so, explain the following details</p> <ol style="list-style-type: none"> <li>1. How much flexibility does the system have to handle unique competency models, proficiency levels, and behavioral descriptors?</li> <li>2. Can each competency have its own unique rating scale?</li> <li>3. Can competencies be configured to be rated at the behavior level, so that the ratings given on each behavior roll up to an overall competency proficiency?</li> <li>4. How do individuals monitor competency attainment?</li> <li>5. Does the system include the ability to associate competencies to specific jobs, roles, and positions so that they can be assigned in bulk?</li> <li>6. Can the system provide standard, out-of-the-box competency content?</li> <li>7. Does the system allow the assignment of competencies to individuals and teams by their managers?</li> <li>8. Can employees complete a self-assessment against a competency or group of competencies at any time?</li> <li>9. Can self, manager, and multi-rater assessments be weighed so that certain assessments carry more weight than others?</li> <li>10. Can the completion of a learning activity also update an individual's held level in a competency?</li> <li>11. Can recommended learning be linked to specific competencies, so that individuals with a competency gap receive guidance as to how to close this gap?</li> <li>12. Does the system support validation processes, whereby managers can validate assessments before a held level is granted?</li> <li>13. Can the same competency library and job hierarchy be maintained in one place to feed the performance management, learning management, succession management, career management, compensation, and workforce planning processes?</li> <li>14. What reports are available to assist with competency management?</li> </ol>


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## 2.6.7 Demo Course

### Instructions:

Please create a sample course in your system using the following criteria to be reviewed and scored on the functionality of the features outlined, the ease of use and overall look and feel of the sample course. Please refrain from adding extraneous items to the sample course for this evaluation. Please provide the URL and any additional information on how to access this Demo course.

1. **Accounts:** This course should have 5000 students enrolled (username format should be “stu.0001”, “stu.0002”, etc.), there should be 5 instructors (username format “instructor\_01”, etc.) and 2 teaching assistants (username format “ta-01”). The Instructors and teaching assistants should have full permissions to administer the course. Please have account all passwords for all accounts be set to “demo”
2. **Discussions:** Create 2 threaded discussions as follows:
  - a. Create a discussion forum called “Forum1” that allows file attachments
    - i. Create two threads in this forum (called “Thread1” and “Thread2”)
      1. “Thread1” should include an attachment (MS Word document)
      2. “Thread2” has one reply by stu.0001 and another reply by stu.0002
    - ii. After creating “Forum1” and posting the above, lock the forum so that students can no longer create new threads.
  - b. Create a graded discussion forum called “Forum2”
    1. stu.0003 creates a thread called “Thread3”
    2. stu.0001 replies to “Thread3”
    3. instructor\_01 replies to “Thread3” with an external link to a website
3. **Announcements:** Post 2 announcements as follows:
  - a. “Announcement #1 Welcome to Demo Course 101 A sample course for Ryerson University”
  - b. “Announcement 2: Lectures will be posted on Monday and Wednesday evening. Tests will be posted every Friday.”
4. **Groups:**
  - a. Create 3 groups where the students may sign up for their preferred group. (Sign-Up Group 01, Sign-Up Group 02). Set a maximum of 3 users per group. Enable all possible group tools.
  - b. Create 12 groups that automatically share the same criteria (i.e. available tools, settings) where the LMS randomly assigns students to a set number of groups. (Name format:

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Random Group 01, Random Group 02). Enable all possible group tools

## 5. Tests & Surveys

- a. Create "Test1":
  - i. Add one example of each question type that is self-graded based on answer selection of the student (Multiple Choice with text, (Multiple Choice with images, Multiple Answer, Calculated Formula, Calculated Numeric, Either/Or, Fill in the Blank, Fill in Multiple Blanks, Opinion Scale/Likert, Ordering, Matching, True/False, Hot Spot, Drag and Drop)
  - ii. Timer should be enabled and set for 30 min, questions should be presented to students in a random order and student should see the grade, provided answers and the correct answers after submission.
  - iii. Allow the students to take the test two times (2 attempts)
  - iv. The grades should be automatically posted to the Gradebook.
  - v. Have one student submission example
- b. Create "Test2":
  - i. Add one example of each question type that awaits grading by the instructor (File Response, Sort/Long Answer, Essay).
  - ii. Students should enter the password 'test' in order to start the test; no timer, all questions presented to students in the same order.
  - iii. Allow instructor to grade each student
  - iv. Have one student submission example
- c. Create SCORM Test:
  - i. This test will be uploaded with the SCORM package provided (refer to our content section in these instructions)
  - ii. Have one student submission example

## 6. Assignments:

- a. Create "Assignment1" (for individual students submission)
  - i. Allow students to upload two files in only one attempt
  - ii. A corresponding column should be automatically created in the Gradebook with 100 points possible

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- iii. Have one student submission example
- b. Create “Assignment2” (for group submission)
  - i. Instructor should provide assignment details in the assignment description, text “Please attach your assignment in MS Word format by May 1st, 2014 at 11:00 PM”
  - ii. Allow group to upload one file, allow 3 attempts
  - iii. A corresponding column should be automatically created in the Gradebook with 100 points possible
  - iv. Have one group submission example\_\_\_\_\_

### 7. Assessments/ Grading Tool:

- a. List all the students in the Gradebook.  
  
Create one column for each grade display type (score, percentage, letter grade, complete/incomplete, etc) where instructors can manually add grades.
- b. Have a column linked to Test1 (where the grades are generated from student completion and submissions of Test1)
- c. Have a column linked to Test2 (where grades will be entered by the instructor)
- d. Have columns linked to Assignment1, Assignment2 where the grades are input by the instructor during assignments grading.
- e. Have one example of a student submission to Test1, Test2, Assignment1
- f. Have one example of a group submission to Assignment2
- g. Have one example of student grades, entered manually in the other columns.
- h. Have calculated column named Final, that calculates all the grade columns based on an assigned percentage.
- i. Have calculated column named Total, that calculates all the grade columns based on addition.
- j. Display a Bonus column that is part of both calculated columns.
- k. Display the SCORM Test column and have one example of graded student submission
- l. The Gradebook should contain Rubric1 that can be used for grading.

### 8. Content: Create 3 content areas with the following titles and items they should contain:

- a. “Module 1” contains:

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- i. PDF of your LMS Instructor how-to (or user guide)

Microsoft Word document (can be retrieved from the following link using <ctrl> click <http://www.ryerson.ca/content/dam/academicintegrity/documents/Avoiding%20Plagiarism%202012%20Final.docx>)

- b. "Module 2" contains:

- i. Microsoft Powerpoint (can be retrieved from the following link using <ctrl> click [http://www.ryerson.ca/content/dam/science/students/applying\\_medicalschool.pptx](http://www.ryerson.ca/content/dam/science/students/applying_medicalschool.pptx))

- ii. SCORM package (zip file can be retrieved from the following link using <ctrl> click <https://drive.google.com/a/ryerson.ca/file/d/0B4dxdWVW7N7mdnFpNjhQX3Roblk/edit?usp=sharing>)

- c. "Module 3" contains:


- i. Embed video from Ryecast

```
<iframe
src="https://ryecast.ryerson.ca/45/embed.aspx?eventId=5112&embedded
=true&clickToGoHome=true&templateType=Archive&autoStart=false"
width="800" height="450" frameborder="0" allowtransparency="true">
</iframe>
```

- ii. Embed video from YouTube

```
<iframe width="560" height="315"
src="//www.youtube.com/embed/ZuGzskZdxGU" frameborder="0"
allowfullscreen>
</iframe>
```



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## 2.6.8 Pricing


Using all of the information in 1. INTRODUCTION, BACKGROUND AND PROJECT OVERVIEW Section 1.4 the Project Background and Overview, and Section 2.4 **Ryerson's Current Learning Management and Related Systems and Services** that outline Ryerson's Current Learning Management System, our Current Capacity of users, course shells, student numbers (including FTE), faculty and staff numbers, provide a detailed breakdown of all costs, one time and annual, - associated with your proposed solution clearly labeling if the solution is:

- A. Hosted
- B. Ryerson Hosted

If you provide both options, please provide separate pricing for each scenario.


Separately include detailed costing for the implementation and migration phase as relating to your response in section 2.6.2 Non-Functional Requirements sub-section 2. Implementation and Migration Strategy.

Please list all the services and the costs of those services that you offer that are not free whether provided by the Vendor via a third party or by the Vendor directly.


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### 3. INSTRUCTIONS TO SUPPLIERS

- 3.1 All Proposals must be filed electronically in PDF format via Ryerson's Public Purchasing Portal at <http://ryerson.bonfirehub.ca>. The proposal package must be in the format sections listed below and be contained in the required PDF file(s) no larger than 25 MB in size. Proposal hardcopies will NOT be accepted by RU.
- 3.2 Please note: uploading large PDFs may take significant time, dependent on your Internet connection speed. All PDFs must be uploaded prior to the Closing Date and Time indicated.
- 3.3 All inquiries, during the RFP process until Award of an Agreement, regarding the RFP must be directed to and submitted in writing, in English, via e-mail to the **RU Contact at: bids@ryerson.ca** as early as possible, but no later than five (5) business days before the Closing Date and Time. Information provided verbally shall not be binding upon RU. Non-compliance with this condition may result in disqualification of the Supplier's Proposal.
- 3.4 Supplier(s) shall reference the numbering system as contained in this RFP, including the solicitation number, the project name as well as any other applicable identifying Appendices for all inquiries and requests regarding the RFP.
- 3.5 The RFP process shall not pre-qualify a potential Supplier on any subsequent opportunity.
- 3.6 All Proposals will be retained for a period of seven (7) years and will be disposed of in a confidential manner.
- 3.7 No changes shall be made to this RFP without the written consent of RU, and all changes shall be made through the issuance of an amendment to the original RFP by the RU Contact and posted on MERX website.
- 3.8 If RU amends the RFP scope, requirements or timeline, RU will post the amendment on MERX and all Suppliers who have registered with MERX will receive notification of the amended RFP.
- 3.9 Any expenses incurred by a Supplier for the preparation and submittal of its Proposal to RU shall be borne by the Supplier. RU shall not reimburse any Supplier(s) for any Proposal(s) received by RU even if an Award is not made.
- 3.10 This RFP is not intended to bind RU, or in any way to restrict RU's rights, or to eliminate any options for future procurement available to RU. Therefore, without limiting the generality of the forgoing, RU reserves the following rights, in its sole discretion, throughout this process:
  - To alter or cancel the RFP process at any time before or after the Closing Date and Time without providing a reason for such amendment or cancellation;
  - To not proceed with a subsequent competitive bidding process;
  - To pursue, or not pursue, any and all procurement opportunities which may be a direct or indirect result of this RFP;

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- To accept or reject any or all Proposals, including the lowest priced Proposal, whether or not it conforms to the RFP.
- 3.11 At any time prior to the Closing Date and Time, a Supplier may amend or withdraw its submitted Proposal.
  - 3.12 Upon the RFP Closing Date and Time, any Proposal(s) received by RU shall be irrevocable by any Supplier for the duration of the Project, and all documents submitted shall become the sole property of RU (excluding trademarks and logos owned by the Supplier).
  - 3.13 RU Evaluation and Scoring Committee may elect to schedule Supplier meetings for clarification of Proposals prior to any Award decision. Sufficient notice will be provided to the Supplier(s) if the Committee decides to proceed.
  - 3.14 Any errors, inconsistencies or ambiguities shall be subject to the interpretation of RU. Each and every alteration or erasure made by the Supplier shall be initialed by an authorized representative of the Supplier. Any mathematical discrepancies as determined by RU shall be corrected by RU.
  - 3.15 The Successful Supplier will not perform any work until it is in possession of an approved RU purchase order issued by Purchasing Services and where applicable, a signed Agreement.
  - 3.16 A Supplier shall not use the name of, or the intellectual or other property of RU, its departments or its employees for any external marketing purposes whatsoever without prior written permission from RU.
  - 3.17 While at RU, personnel of a Supplier must observe all policies and regulations of RU including “Discrimination and Harassment Prevention”, “Occupational Health and Safety” and “Vehicles on Campus” (parking) regulations.  
  
([http://www.ryerson.ca/ehss/programs\\_policies/index.html](http://www.ryerson.ca/ehss/programs_policies/index.html)).
  - 3.18 In submitting its Proposal, the Supplier shall comply fully with all applicable federal, provincial and municipal laws, rules and regulations. The laws of the Province of Ontario shall govern in any dispute that may arise as a result of the Supplier’s Proposal submission and the subsequent Agreement Awarded to the Successful Supplier(s).
  - 3.19 All plans, materials and electronic or digital files paid for by RU are the property of RU.
  - 3.20 Successful Supplier(s) must be registered in Ontario for the collection and remittance of HST from the sale of goods and Services.
  - 3.21 Proposals will be considered solely on the basis of a business arrangement with no linkage to offers of donation, scholarships or similar quid pro quos.

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#### 4. SUPPLIER PROPOSAL REQUIREMENTS

All Proposals shall be formatted and organized to include details for each of the ten (10) sections outlined below or the Proposal may not be further evaluated.

**Please upload three (3) separate files. One (1) file for the Proposal (without pricing), one (1) file for the Pricing and one (1) file with the signed Supplier Acknowledgement.**

##### **Section 1 – Supplier Acknowledgement – 2 pages and signed**

Provide the following: Completed Appendix ‘A’ – Supplier’s Acknowledgement form.

**Section 2 – Company Market Space, Reputation and Stability** (please refer to the requirements detailed in Section 2- Deliverables).

In addition please provide the following information:

- List your mission statement and/or Supplier philosophy
- A letter from an Insurance Company stating that your company has the ability to acquire an Insurance Certificate for \$5,000,000 general liability insurance, and that RU will be named as additional insured on the CGL policy.
- Completed and signed Appendix ‘B, Form 1- Customer Reference
- Completed and signed Appendix ‘B, Form 2 – Health and Safety Act Sign-off sheet;

Please indicate if you have an employee security screening program in place. If yes, please describe.

**Section 3 – Features and Technical (Functional and Non Functional)** - Please refer to the requirements detailed in Section 2.6.1 & 2.6.2- Deliverables.


**Section 4 – Accessibility Compliance** – Please refer to the requirements detailed in Section 2.6.3 - Deliverables

**Section 5 – Support and Services** - (please refer to the requirements detailed in Section 2.6.4- Deliverables).

**Section 6– Data Security and Privacy Protection-** (please refer to the requirements detailed in Section 2.6.5- Deliverables).

**Section 7 – Use Cases** - (please refer to the requirements detailed in Section 2.6.6- Deliverables).

**Section 8 – Demo Course** – URL must be provided to access the demo course (please refer to the requirements detailed in Section 2.6.7- Deliverables).

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## Section 9 – Pricing

Please refer to Section 2.6.8 Pricing

- It is understood that Harmonized Sales Tax (HST) are excluded. All fees are to be stated in Canadian Dollars.
- RU's Payment terms are net 45 days after work completion and invoicing. RU will not consider any prepayment terms.
- RU does not reimburse Suppliers for any expenses.

## Section 10 – Environmental Plan

Provide the following:

RU is interested in identifying the impact of products procured on the environment. Suppliers are to provide an environmental performance plan which includes any green initiatives taken by the Supplier that have an environmental impact (**reduce, reuse and recycle**).

## 5. EVALUATION OF PROPOSALS

- 5.1 Proposals will be evaluated on the basis of the Suppliers ability to meet the requirements detailed in the RFP.
- 5.2 Proposals will be subject to a comprehensive analysis and evaluation, based on the best overall value to Ryerson.
- 5.3 Suppliers may be requested to provide further clarification at any time during the evaluation process or after closing without RU having any obligation to offer the same opportunity to all Suppliers. The Supplier(s) will be given two (2) Business Days to respond in writing.
- 5.4 **Stages of Proposal Evaluation:** RU will conduct the evaluation of Proposals in the following three (3) stages:

### Stage 1 – Mandatory Requirements (Pass/Fail):

A review of all received Proposals will be completed by the RU Contact to determine compliance with all of the mandatory requirements listed above. Proposals that do not comply with all the mandatory requirements may be subject to disqualification and not evaluated.

### Stage 2 –Qualitative Evaluation:

All Proposals that have passed Stage 1 of the evaluation process shall proceed to Stage 2 for evaluation committee scoring based on the following criteria:


CRITERIA	WEIGHTING (POINTS)
Company Market Space, Reputation and Stability	5
Features and Technical Requirements ( Functional and Non Functional Requirements)- 2.6.1 & 2.6.2	40
Accessibility Compliance (2.6.3)	5
Support and Services (2.6.4)	10
Data Security and Privacy Protection (2.6.5)	10
Use Cases (2.6.6)	10
Demo Course (2.6.7)	5
Environmental Plan	5
<b>Subtotal</b>	<b>90</b>

### Stage 3 – Pricing:

The pricing of all Proposals that have passed Stage 1 of the evaluation process shall be evaluated and scored by the RU Contact based on the following criteria:


CRITERIA	WEIGHTING (POINTS)
Pricing	10
<b>Subtotal</b>	<b>10</b>

<b>Total Evaluated Score</b>	<b>100</b>
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## 6. AWARD PROCESS

- 6.1 RU is not obligated to award an Agreement as a result of this RFP and reserves the right in its sole discretion to cancel this RFP process at any time before or after the Closing Date and Time without providing reasons for such cancellation.
- 6.2 In order to finalize a mutually agreeable Agreement, RU may enter into negotiations with one or more Supplier(s) without obligation to negotiate with, or, offer the same opportunity to, all Suppliers. If negotiations with a recommended Supplier do not result in an Agreement (Sample - Appendix 'D'), RU may enter into negotiations with any other Supplier regardless of such Supplier's evaluated score, or RU may elect to discontinue negotiations and terminate this RFP, at its option.
- 6.3 Final acceptance of the recommendation to Award by the evaluation committee is subject to RU's budgetary and/or, if applicable, external funding agency approval.
- 6.4 A single Agreement may be awarded for the entire Proposal or multiple Agreements may be awarded for portions of the Proposal. Final Award and execution of an Agreement will occur after the successful completion of mutually agreed negotiations between the recommended Supplier(s) and RU.
- 6.5 Notification of Award of the Successful Supplier(s) will be posted on both MERX and RU websites.
- 6.6 Unsuccessful Suppliers shall have the option to request a debrief in writing to the RU Contact within thirty (30) days following RU's posting of the Successful Supplier on the MERX and/or RU's website. RU will not release any information regarding the RFP before that date except to the Successful Supplier(s).

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**APPENDIX 'A' - Supplier's Acknowledgement**

**Supplier(s): Please complete the following information as applicable and return to RU with your Proposal:**

Full Legal Name of Supplier:	
Parent Company Name (if different):	
List any other Supplier owned Companies:	
Street Address:	
City, Province/State:	
Postal Code:	
Phone Number:	
Fax Number:	
Company Website:	
HST Tax identification number:	
Contact Person and Title:	
Contact Phone:	
Contact Facsimile:	
Contact E-mail:	

**The Supplier hereby acknowledges and accepts the following:**

**1. Acknowledgment of Non-Binding Procurement Process**

The Supplier acknowledges that this RFP process will be governed by the terms and conditions of the RFP and that, among other things, such terms and conditions confirm that this procurement process does not constitute a formal legally binding bidding process and that there will be no legal relationship or obligations created until RU and the Successful Supplier have executed a written Agreement.

**2. Ability to Provide Deliverables**


The Supplier has carefully examined the RFP documents and has a clear and comprehensive knowledge of the Deliverables required under the RFP. The Supplier represents and warrants its ability to provide the Deliverables required under the RFP in accordance with the Rates set out in the Pricing Appendix 'C' and Table 1.

**3. Authorization**

The Supplier acknowledges the following:

- Authorizes Ryerson University to contact the references named in its Proposal;



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- To submit a letter of good standing from the Workplace Safety Insurance Board of Ontario;
- To submit a certified copy of liability insurance for the coverage required;
- To provide documentary proof of all the projects listed in this submission;
- To attend a meeting, if requested

**4. Pricing**

The Supplier acknowledges that any inaccurate, misleading or incomplete information, including withdrawn or altered pricing, could adversely impact the acceptance of its Proposal.

**5. Addenda**

The Supplier is deemed to have read and accepted all addenda issued by RU and as posted on the MERX website prior to the Closing Date and Time. The onus remains on the Supplier to make any necessary amendments to its Proposal based on any addenda issued concerning this RFP.

**6. Conflict of Interest**

The term “Conflict of Interest” means “in relation to the RFP process, if any Supplier may have an unfair advantage or is deemed to engage in conduct, directly or indirectly, that may give it an unfair advantage, including but not limited to:

- (a) Having or having access to confidential information of RU in the preparation of its Proposal that is not available to other Suppliers;
- (b) Communicating with any person with a view to influencing preferred treatment in the RFP process (including but not limited to the lobbying of decision makers involved in the RFP process);
- (c) Engaging in conduct that compromises or could be seen to compromise the integrity of the RFP process.
- (d) If the box below is left blank, the Supplier will be deemed to declare that:
  - There was no Conflict of Interest in preparing its Proposal; and
  - There is no foreseeable Conflict of Interest in performing the obligations contemplated in the RFP.
  - Otherwise, check this box if the statement applies: The Supplier declares that there is an actual or potential Conflict of Interest relating to the preparation of its Proposal, and/or the Supplier foresees an actual or potential Conflict of Interest in performing the obligations contemplated in the RFP.

If the Supplier declares an actual or potential Conflict of Interest by marking the box, the Supplier must set out details of the actual or potential Conflict of Interest below:


**I have authority to bind the Supplier**

<b>Name of Supplier representative</b>	<b>Signature of Supplier representative</b>
<b>Title</b>	<b>Dated (mm/dd/yr)</b>

**APPENDIX 'B' - FORM 1 - CUSTOMER REFERENCE**

**LEARNING MANAGEMENT SYSTEMS AND SERVICES**

<b>#1 – Customer Name (Company/Organization):</b>				<b>Location Address:</b>			
<b>Customer Contact Name:</b>		<b>Position:</b>		<b>Phone No.:</b>		<b>Email Address:</b>	
<b>Business/Organization Type:</b>				<b>Length of Relationship:</b>			
University/College							
Other Public Sector/Municipality				<b>Type of Relationship</b>			
Industrial/Commercial							
<b>#2 – Customer Name (Company/Organization):</b>				<b>Location Address:</b>			
<b>Customer Contact Name:</b>		<b>Position:</b>		<b>Phone No.:</b>		<b>Email Address:</b>	
<b>Business/Organization Type:</b>				<b>Length of Relationship:</b>			
University/College							
Other Public Sector/Municipality				<b>Type of Relationship</b>			
Industrial/Commercial							
<b>#3 – Customer Name (Company/Organization):</b>				<b>Location Address:</b>			
<b>Customer Contact Name:</b>		<b>Position:</b>		<b>Phone No.:</b>		<b>Email Address:</b>	
<b>Business/Organization Type:</b>				<b>Length of Relationship:</b>			
University/College							
Other Public Sector/Municipality				<b>Type of Relationship</b>			
Industrial/Commercial							

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**APPENDIX 'B' - FORM 2 - OCCUPATIONAL HEALTH AND SAFETY FORM**

*Completed form is to be submitted with Bid.*

SIGN OFF DOCUMENT FOR OCCUPATIONAL HEALTH AND SAFETY ACT, LEGAL DEFINITIONS AND DUTIES OF WORKPLACE PARTIES AND RYERSON UNIVERSITY OCCUPATIONAL HEALTH AND SAFETY POLICY.

This form references the following documents:

1. Occupational Health and Safety ACT and REGULATIONS for Construction Project, issued by the Province of Ontario – Revised Statutes of Ontario, 1990 ch.01 as amended
2. [http://www.ryerson.ca/ehss/programs\\_policies/index.html](http://www.ryerson.ca/ehss/programs_policies/index.html) (Internal RU policy)

The party having signing authority for the contractor shall sign this document. This is to indicate that the enclosed documents have been thoroughly read, fully understood and shall be duly complied with throughout the duration of the contract as to the contractor's responsibilities while in the employment of Ryerson University.

Failure to sign this document and returning same when the tender is submitted will result in the tender being rejected.

COMPANY

\_\_\_\_\_

SIGNATURE OF SIGNING AUTHORITY \_\_\_\_\_


NAME \_\_\_\_\_

TITLE \_\_\_\_\_

WITNESS SIGNATURE \_\_\_\_\_

NAME \_\_\_\_\_

DATE \_\_\_\_\_

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### **APPENDIX 'C'- Pricing**

1. Please refer to Section 2.6.8 Pricing from Section 2- Deliverables
2. All fees are to be stated in Canadian dollars;
3. Fees shall not include applicable taxes;
4. Please list any exclusions or assumptions which have been considered as part of your Fee Proposal;
5. Rates are to include all expenses/disbursements (i.e. delivery, fuel, parking, faxing, photocopying, telephone etc.). Note: RU does not reimburse Suppliers for any expenses.

## APPENDIX 'D' - SAMPLE AGREEMENT

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**AGREEMENT  
(DRAFT ONLY)**

**THIS AGREEMENT** (the “Agreement”), made in duplicate, for **[insert name of Deliverables]** is effective as of the **[\*insert start date for the Term\*]**

**BETWEEN:**

**RYERSON UNIVERSITY**  
(Referred to as “RU”)

**AND:**

**[\*LEGAL NAME OF SUPPLIER\*]**

(Referred to as the “Supplier”)

In consideration of their respective Agreements set out below, the parties covenant and agree as follows:

**ARTICLE 1 – INTERPRETATION AND GENERAL PROVISIONS**

**1.01 Defined Terms**

When used in the Agreement, the following words or expressions have the following meanings:


“**Agreement**” means the aggregate of: (a) the Agreement, including Schedule 1 (Schedule of Deliverables, Rates and Supplementary Provisions), Schedule 2 (Schedule of Forms) and any other schedule attached at the time of execution; (b) the RFP, including any addenda; (c) the Proposal; and (d) any amendments executed in accordance with the terms of the Agreement;

“**Authority**” means any government authority, agency, body or department, whether federal, provincial or municipal, having or claiming jurisdiction over the Agreement; and “**Authorities**” means all such authorities, agencies, bodies and departments;

“**Business Day**” means any working day, Monday to Friday inclusive, but excluding statutory and other holidays, namely: New Year’s Day; Family Day; Good Friday; Victoria Day; Canada Day; Civic Holiday; Labour Day; Thanksgiving Day; Christmas Day; Boxing Day and any other day which RU has elected to be closed for business;

“**Conflict of Interest**” includes, but is not limited to, any situation or circumstance where:

- (a) in relation to the RFP process, the Supplier has an unfair advantage or engages in conduct, directly or indirectly, that may give it an unfair advantage, including but not limited to (i) having or having access to information in the preparation of its proposal that is confidential to RU and not available to other Suppliers; (ii) communicating with any person with a view to influencing preferred treatment in the RFP process; or (iii) engaging in conduct that compromises or could be seen to compromise the integrity of the open and competitive RFP process and render that process non-competitive and unfair; or

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(b) in relation to the performance of its obligations in a RU Agreement, the Supplier's other commitments, relationships or financial interests (i) could or could be seen to exercise an improper influence over the objective, unbiased and impartial exercise of its independent judgment; or (ii) could or could be seen to compromise, impair or be incompatible with the effective performance of its obligations;

**“Deliverables”** means everything developed for or provided to RU in the course of performing under the Agreement or agreed to be provided to RU under the Agreement by the Supplier or its directors, officers, employees, agents, partners, affiliates, volunteers or subcontractors, as further defined, including but not limited to any goods or services or any and all Intellectual Property and any and all concepts, techniques, ideas, information, documentation and other materials, however recorded, developed or provided;

**“Expiry Date”** means [\*insert date] or, if the original term is extended, the final date of the extended term;

**“FIPPA”** means the *Freedom of Information and Protection of Privacy Act*, R.S.O. 1990, c. F.31, as amended;

**“Indemnified Parties”** means the Ryerson University, its governors, officers, employees, agents and legal representatives;

**“Industry Standards”** include, but are not limited to (a) the provision of any and all labour, supplies, equipment and other goods or services that are necessary and can reasonably be understood or inferred to be included within the scope of the Agreement or customarily furnished by Persons providing Deliverables of the type provided hereunder in similar situations in Ontario and; (b) adherence to commonly accepted norms of ethical business practices, which shall include the Supplier establishing, and ensuring adherence to, precautions to prevent its employees or agents from providing or offering gifts or hospitality of greater than nominal value to any person acting on behalf of or employed by the RU;

**“Intellectual Property”** means any intellectual, industrial or other proprietary right of any type in any form protected or protectable under the laws of Canada, any foreign country, or any political subdivision of any country, including, without limitation, any intellectual, industrial or proprietary rights protected or protectable by legislation, by common law or at equity;


**“Newly Created Intellectual Property”** means any Intellectual Property created by the Supplier in the course of performance of its obligations under the Agreement;

**“Person”** if the context allows, includes any individuals, persons, firms, partnerships or corporations or any combination thereof;

**“Personal Information”** means recorded information about an identifiable individual or that may identify an individual;

**“Proceeding”** means any action, claim, demand, lawsuit, or other proceeding;

**“Procurement Card”** means the corporate charge card(s) used by RU, as may be changed from time to time;

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**"Procurement Card Protocols"** means the manner in which the Supplier is required to process any payments under the Agreement that the RU elects to make by way of Procurement Card, which shall include the requirement to: (a) collect the authorized employee's name, the abbreviated RU name, the expiry date, and the employee's authorization; (b) Contact the financial institution identified on the Procurement Card each time the Procurement Card is used for payment; (c) receive payment from the financial institution named on the Procurement Card once that institution authorizes payment; and (d) bear the cost of any and all charges relating to the use of the Procurement Card, including the financial institution's charges for payment through the Procurement Card;

**"Proposal"** means all the documentation submitted by the Supplier in response to the RFP;

**"Rates"** means the applicable price, in Canadian funds, to be charged for the applicable Deliverables, as set out in Schedule 1, representing the full amount chargeable by the Supplier for the provision of the Deliverables, including but not limited to: (a) all applicable duties and taxes,; (b) all labour and material costs; (c) all travel and carriage costs; (d) all insurance costs; and (e) all other overhead including any fees or other charges required by law;

**"Record"**, for the purposes of the Agreement, means any recorded information, including any Personal Information, in any form: (a) provided by RU to the Supplier, or provided by the Supplier to RU, for the purposes of the Agreement; or (b) created by the Supplier in the performance of the Agreement;

**"Requirements of Law"** mean all applicable requirements, laws, statutes, codes, acts, ordinances, orders, decrees, injunctions, by-laws, rules, regulations, official plans, permits, licenses, authorizations, directions, and Agreements with all Authorities that now or at any time hereafter may be applicable to either the Agreement or the Deliverables or any part of them;


**"RFP"** means the Request for Proposals dated **[\*insert date\*]** for **[\*insert name of RFP\*]**, reference number **[\*insert reference number\*]** issued by RU for the Deliverables and any addenda to it;

**"RU Confidential Information"** means all information of RU that is of a confidential nature, including all confidential information in the custody or control of RU, regardless of whether it is identified as confidential or not, and whether recorded or not, and however fixed, stored, expressed or embodied, which comes into the knowledge, possession or control of the Supplier in connection with the Agreement. For greater certainty, RU Confidential Information shall:

(a) include: (i) all new information derived at any time from any such information whether created by RU, the Supplier or any third-party; (ii) all information (including Personal Information) that RU is obliged, or has the discretion, not to disclose under provincial or federal legislation or otherwise at law; but

(b) not include information that: (i) is or becomes generally available to the public without fault or breach on the part of the Supplier of any duty of confidentiality owed by the Supplier to RU or to any third-party; (ii) the Supplier can demonstrate to have been rightfully obtained by the Supplier, without any obligation of confidence, from a third-party who had the right to transfer or disclose it to the Supplier free of any obligation of confidence; (iii) the Supplier can demonstrate to have been rightfully known to or in the possession of the Supplier at the time of disclosure, free of any obligation of confidence when disclosed; or (iv) is independently developed by the Supplier; but the exclusions in



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this subparagraph shall in no way limit the meaning of Personal Information or the obligations attaching thereto under the Agreement or at law.

“**Supplier Address**” and “**Supplier Representative**” mean:

**[\*\*insert Supplier’s mailing address \*\*]**

**[\*\*insert name and title, telephone and facsimile number for Supplier representative, as well as same information for back -up person if available\*\*]**

“**Supplier’s Intellectual Property**” means Intellectual Property owned by the Supplier prior to its performance under the Agreement or created by the Supplier during the Term of the Agreement independently of the performance of its obligations under the Agreement;

“**Term**” means the period of time from the effective date first above written up to and including the earlier of: (i) the Expiry Date or (ii) the date of termination of the Agreement in accordance with its terms;

“**Third-Party Intellectual Property**” means any Intellectual Property owned by a party other than the Ryerson University or the Supplier;

**1.02 No Indemnities from RU**

Notwithstanding anything else in the Agreement, any express or implied reference to RU providing an indemnity or any other form of indebtedness or contingent liability that would directly or indirectly increase the indebtedness or contingent liabilities of RU, whether at the time of execution of the Agreement or at any time during the Term, shall be void and of no legal effect.

**1.03 Entire Agreement**

The Agreement embodies the entire Agreement between the parties with regard to the provision of Deliverables and supersedes any prior understanding or Agreement, collateral, oral or otherwise with respect to the provision of the Deliverables, existing between the parties at the date of execution of the Agreement.

**1.04 Severability**

If any term or condition of the Agreement, or the application thereof to the parties or to any Persons or circumstances, is to any extent invalid or unenforceable, the remainder of the Agreement, and the application of such term or condition to the parties, Persons or circumstances other than those to which it is held invalid or unenforceable, shall not be affected thereby.

**1.05 Interpretive Value of Agreement Documents**


In the event of a conflict or inconsistency in any provisions in the Agreement: (a) the main body of the Agreement shall govern over the Schedules to the Agreement; (b) the Agreement (including its Schedules) shall govern over the RFP and the Proposal; and (c) the RFP shall govern over the Proposal.

**1.06 Interpretive Value of Headings**

The headings in the Agreement are for convenience of reference only and in no manner modify, interpret or construe the Agreement.

**1.07 Force Majeure**

Neither party shall be liable for damages caused by delay or failure to perform its obligations under the Agreement where such delay or failure is caused by an event beyond its reasonable control. The parties agree that an event shall not be considered

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beyond one's reasonable control if a reasonable business person applying due diligence in the same or similar circumstances under the same or similar obligations as those contained in the Agreement would have put in place contingency plans to either materially mitigate or negate the effects of such event. Without limiting the generality of the foregoing, the parties agree that force majeure events shall include natural disasters and acts of war, insurrection and terrorism but shall not include shortages or delays relating to supplies or services. If a party seeks to excuse itself from its obligations under this Agreement due to a force majeure event, that party shall immediately notify the other party of the delay or non-performance, the reason for such delay or non-performance and the anticipated period of delay or non-performance. If the anticipated or actual delay or non-performance exceeds fifteen (15) Business Days, the other party may immediately terminate the Agreement by giving notice of termination and such termination shall be in addition to the other rights and remedies of the terminating party under the Agreement, at law or in equity.

**1.08 Notices by Prescribed Means**

Notices shall be in writing and shall be delivered by postage-prepaid envelope, personal delivery or facsimile and shall be addressed to, respectively, RU Address to the attention of the RU Representative and to the Supplier Address to the attention of the Supplier Representative. Notices shall be deemed to have been given: (a) in the case of postage-prepaid envelope, five (5) Business Days after such notice is mailed; or (b) in the case of personal delivery or facsimile one (1) Business Day after such notice is received by the other party. In the event of a postal disruption, notices must be given by personal delivery or by facsimile. Unless the parties expressly agree in writing to additional methods of notice, notices may only be provided by the methods contemplated in this paragraph.

**1.09 Governing Law**

The Agreement shall be governed by and construed in accordance with the laws of the Province of Ontario and the federal laws of Canada applicable therein.

**ARTICLE 2 – NATURE OF RELATIONSHIP BETWEEN RYERSON UNIVERSITY (RU) AND SUPPLIER**

**2.01 Supplier's Power to Agreement**

The Supplier represents and warrants that it has the full right and power to enter into the Agreement and there is no Agreement with any other Person which would in any way interfere with the rights of RU under this Agreement.

**2.02 Representatives May Bind the Parties**


The parties represent that their respective representatives have the authority to legally bind them to the extent permissible by the Requirements of Law.

**2.03 Supplier Not a Partner, Agent or Employee**

The Supplier shall have no power or authority to bind RU or to assume or create any obligation or responsibility, express or implied, on behalf of RU. The Supplier shall not hold itself out as an agent, partner or employee of RU. Nothing in the Agreement shall have the effect of creating an employment, partnership or agency relationship between RU and the Supplier (or any of the Supplier's directors, officers, employees, agents, partners, affiliates, volunteers or subcontractors).

**2.04 Responsibility of Supplier**

The Supplier agrees that it is liable for the acts and omissions of its directors, officers, employees, agents, partners, affiliates, volunteers and subcontractors. This paragraph is in addition to any and all of the Supplier's liabilities under the Agreement and under the general application of law. The Supplier shall advise these individuals and entities of their

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obligations under the Agreement and shall ensure their compliance with the applicable terms of the Agreement. In addition to any other liabilities of the Supplier pursuant to the Agreement or otherwise at law or in equity, the Supplier shall be liable for all damages, costs, expenses, losses, claims or actions arising from any breach of the Agreement resulting from the actions of the above mentioned individuals and entities This paragraph shall survive the termination or expiry of this Agreement.

**2.05 No Subcontractors or Assignment**

The Supplier shall not subcontract or assign the whole or any part of the Agreement or any monies due under it without the prior written consent of RU. Such consent shall be in the sole discretion of RU and subject to the terms and conditions that may be imposed by RU. Without limiting the generality of the conditions which RU may require prior to consenting to the Supplier's use of a subcontractor, every Agreement entered into by the Supplier with a subcontractor shall adopt all of the terms and conditions of this Agreement as far as applicable to those parts of the Deliverables provided by the subcontractor. Nothing contained in the Agreement shall create a contractual relationship between any subcontractor or its directors, officers, employees, agents, partners, affiliates or volunteers and RU.

**2.06 Duty to Disclose Change of Control**

In the event that the Supplier undergoes a change in control the Supplier shall immediately disclose such change in control to RU and shall comply with any terms and conditions subsequently prescribed by RU resulting from the disclosure.

**2.07 Conflict of Interest**

The Supplier shall: (a) avoid any Conflict of Interest in the performance of its contractual obligations; (b) disclose to RU without delay any actual or potential Conflict of Interest that arises during the performance of its contractual obligations; and (c) comply with any requirements prescribed by RU to resolve any Conflict of Interest. In addition to all other contractual rights or rights available at law or in equity, RU may immediately terminate the Agreement upon giving notice to the Supplier where: (a) the Supplier fails to disclose an actual or potential Conflict of Interest; (b) the Supplier fails to comply with any requirements prescribed by RU to resolve a Conflict of Interest; or (c) the Supplier's Conflict of Interest cannot be resolved. This paragraph shall survive any termination or expiry of the Agreement.

**2.08 Agreement Binding**

The Agreement shall endure to the benefit of and be binding upon the parties and their successors, executors, administrators and their permitted assigns.


**ARTICLE 3 - PERFORMANCE BY SUPPLIER**

**3.01 Commencement of Performance**

The Supplier shall commence performance upon receipt of written instructions in the form of a purchase order entered into with RU.

**3.02 Deliverables Warranty**

The Supplier hereby represents and warrants that the Deliverables (i) shall be provided fully and diligently in a professional and competent manner by persons qualified and skilled in their occupations; and (ii) shall be free from defects in material, workmanship and design, suitable for the purposes intended, in compliance with all applicable specifications and free from liens or encumbrance on title; and furthermore that all Deliverables shall be provided in accordance with: (a) the Agreement; (b) Industry Standards; and (c) Requirements of Law. If any of the Deliverables, in the opinion of RU,

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are inadequately provided or require corrections, the Supplier shall forthwith make the necessary corrections at its own expense as specified by RU in a rectification notice.

**3.03 Use and Access Restrictions**

The Supplier acknowledges that unless it obtains specific written preauthorization from RU, any access to or use of RU property, technology or information that is not necessary for the performance of its contractual obligations with RU is strictly prohibited. The Supplier further acknowledges that RU may monitor the Supplier to ensure compliance with this paragraph. This paragraph is in addition to and shall not limit any other obligation or restriction placed upon the Supplier.

**3.04 Notification by Supplier to RU**

During the Term, the Supplier shall advise RU promptly of: (a) any contradictions, discrepancies or errors found or noted in the Agreement; (b) supplementary details, instructions or directions that do not correspond with those contained in the Agreement; and (c) any omissions or other faults that become evident and should be corrected in order to provide the Deliverables in accordance with the Agreement and Requirements of Law.

**3.05 Condonation Not a Waiver**

Any failure by RU to insist in one or more instances upon strict performance by the Supplier of any of the terms or conditions of the Agreement shall not be construed as a waiver by RU of its right to require strict performance of any such terms or conditions, and the obligations of the Supplier with respect to such performance shall continue in full force and effect.

**3.06 Changes by Written Amendment Only**

Any changes to the Agreement shall be by written amendment signed by the parties. No changes shall be effective or shall be carried out in the absence of such an amendment.

**3.07 Supplier to Comply With Reasonable Change Requests**


RU may, in writing, request changes to the Agreement, which may include altering, adding to, or deleting any of the Deliverables. The Supplier shall comply with all reasonable RU change requests and the performance of such request shall be in accordance with the terms and conditions of the Agreement. If the Supplier is unable to comply with the change request, it shall promptly notify RU and provide reasons for such non-compliance. In any event, any such change request shall not be effective until a written amendment reflecting the change has been executed by the parties.

**3.08 Pricing for Requested Changes**

Where a RU change request includes an increase in the scope of the previously contemplated Deliverables, RU shall set out, in its change request, the proposed prices for the contemplated changes. Where the Rates in effect at the time of the change request:

- (a) include pricing for the particular type of goods or services contemplated in the change request, the Supplier shall not unreasonably refuse to provide those goods or services at prices consistent with those Rates; or
- (b) are silent to the applicable price for the particular goods or services contemplated in the change request, the price shall be negotiated between RU and the Supplier within a reasonable period of time;

and in any event, such change request shall not become effective until a written amendment reflecting the change has been executed by the parties.

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**3.09 Non-Exclusive Agreement, Work Volumes**

The Supplier acknowledges that it is providing the Deliverables to RU on a non-exclusive basis. RU makes no representation regarding the volume of goods and services required under the Agreement. RU reserves the right to Agreement with other parties for the same or similar goods and services as those provided by the Supplier and reserves the right to obtain the same or similar goods and services internally.

**3.10 Performance by Specified Individuals Only**

The Supplier agrees that to the extent that specific individuals are named in the Agreement as being responsible for the provision of the Deliverables, only those individuals shall provide the Deliverables under the Agreement. The Supplier shall not replace or substitute any of the individuals named in the Agreement without the prior written approval of RU, which may not arbitrarily or unreasonably be withheld. Should the Supplier require the substitution or replacement of any of the individuals named in the Agreement, it is understood and agreed that any proposed replacement must possess similar or greater qualifications than the individual named in the Agreement. The Supplier shall not claim fees for any replacement individual greater than the Rates established under the Agreement.

**3.11 RU Rights and Remedies and Supplier Obligations Not Limited to Agreement**

The express rights and remedies of RU and obligations of the Supplier set out in the Agreement are in addition to and shall not limit any other rights and remedies available to RU or any other obligations of the Supplier at law or in equity.

**ARTICLE 4 - PAYMENT FOR PERFORMANCE AND AUDIT**


**4.01 Payment According to Agreement Rates**

RU shall, subject to the Supplier's compliance with the provisions of the Agreement, pay the Supplier for the Deliverables provided at the Rates established under the Agreement.

**4.02 Default Billing and Payment Process**

Unless the parties expressly set out an alternative billing and payment process in Schedule 1, the following process shall govern:

- (a) the Supplier shall provide RU with a monthly billing statement no later than ten (10) Business Days after the end of each month and that billing statement shall include: (i) the Purchase Order number assigned to the Agreement by RU; (ii) a brief description of the Deliverables provided for the relevant month; and (iii) taxes, if payable by RU, identified as separate items;
- (b) RU shall approve or reject the billing statement within fifteen (15) Business Days of receipt of the statement and in the event that RU rejects the billing statement, it shall so advise the Supplier promptly in writing and the Supplier shall provide additional information as required by RU to substantiate the billing statement;
- (c) each billing statement is subject to the approval of RU before any payment is released and payment shall be made within forty-five (45) Business Days of such approval; and
- (d) RU may make payments to the Supplier for Deliverables provided under the Agreement by way of Electronic Fund Transfer, Cheque or Procurement Card and the Supplier shall make all necessary arrangements to facilitate RU's payments;

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and any subparagraph set out above that is not expressly replaced in Schedule 1 with an alternative provision shall remain in full force and effect.

**4.03 Hold Back or Set Off**

RU may hold back payment or set off against payment if, in the opinion of RU acting reasonably, the Supplier has failed to comply with any requirements of the Agreement.

**4.04 No Expenses or Additional Charges**

There shall be no other charges payable by RU under the Agreement to the Supplier other than the Rates established under the Agreement.

**4.05 Payment of Taxes and Duties**

Unless otherwise stated, the Supplier shall invoice RU for all applicable taxes and duties, incurred by or on the Supplier's behalf with respect to the Agreement.

**4.06 Interest on Late Payment**

If a payment is in arrears through no fault of the Supplier, the interest charged by the Supplier, if any, for any late payment shall not exceed the pre-judgment interest rate established under section 127(2) of the *Courts of Justice Act*, R.S.O. 1990, c. C45, in effect on the date that the payment went into arrears.

**ARTICLE 5 - CONFIDENTIALITY AND FIPPA**

**5.01 Confidentiality and Promotion Restrictions**

Any publicity or publications related to the Agreement shall be at the sole discretion of RU. RU may, in its sole discretion, acknowledge the Deliverables provided by the Supplier in any such publicity or publication. The Supplier shall not make use of its association with RU without the prior written consent of RU. Without limiting the generality of this paragraph, the Supplier shall not, among other things, at any time directly or indirectly communicate with the media in relation to the Agreement unless it has first obtained the express written authorization to do so by RU.

**5.02 RU Confidential Information**


During and following the Term, the Supplier shall: (a) keep all RU Confidential Information confidential and secure; (b) limit the disclosure of RU Confidential Information to only those of its directors, officers, employees, agents, partners, affiliates, volunteers or subcontractors who have a need to know it for the purpose of providing the Deliverables and who have been specifically authorized to have such disclosure; (c) not directly or indirectly disclose, destroy, exploit or use any RU Confidential Information (except for the purpose of providing the Deliverables, or except if required by order of a court or tribunal), without first obtaining: (i) the written consent of RU and (ii) in respect of any RU Confidential Information about any third-party, the written consent of such third-party; (d) provide RU Confidential Information to RU on demand; and (e) return all RU Confidential Information to RU before the end of the Term, with no copy or portion kept by the Supplier.

**5.03 Restrictions on Copying**

The Supplier shall not copy any RU Confidential Information, in whole or in part, unless copying is essential for the provision of the Deliverables. On each copy made by the Supplier, the Supplier must reproduce all notices which appear on the original.

**5.04 Injunctive and Other Relief**

The Supplier acknowledges that breach of any provisions of this Article may cause irreparable harm to RU or to any third-party to whom RU owes a duty of confidence, and that the injury to RU or to any third-party may be difficult to calculate and inadequately

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compensable in damages. The Supplier agrees that RU is entitled to obtain injunctive relief (without proving any damage sustained by it or by any third-party) or any other remedy against any actual or potential breach of the provisions of this Article.


**5.05 Notice and Protective Order**

If the Supplier or any of its directors, officers, employees, agents, partners, affiliates, volunteers or subcontractors become legally compelled to disclose any RU Confidential Information, the Supplier will provide RU with prompt notice to that effect in order to allow RU to seek one or more protective orders or other appropriate remedies to prevent or limit such disclosure, and it shall co-operate with RU and its legal counsel to the fullest extent. If such protective orders or other remedies are not obtained, the Supplier will disclose only that portion of RU Confidential Information which the Supplier is legally compelled to disclose, only to such person or persons to which the Supplier is legally compelled to disclose, and the Supplier shall provide notice to each such recipient (in co-operation with legal counsel for RU) that such RU Confidential Information is confidential and subject to non-disclosure on terms and conditions equal to those contained in the Agreement and, if possible, shall obtain each recipient's written Agreement to receive and use such RU Confidential Information subject to those terms and conditions.

**5.06 FIPPA Records and Compliance**

The Supplier and RU acknowledge and agree that FIPPA applies to and govern all Records and may require the disclosure of such Records to third parties. Furthermore, the Supplier agrees:

- (a) to keep Records secure;
- (b) to provide Records to RU within seven (7) calendar days of being directed to do so by RU for any reason including an access request or privacy issue;
- (c) not to access any Personal Information unless RU determines, in its sole discretion, that access is permitted under FIPPA and is necessary in order to provide the Deliverables;
- (d) not to directly or indirectly use, collect, disclose or destroy any Personal Information for any purposes that are not authorized by RU;
- (e) to ensure the security and integrity of Personal Information and keep it in a physically secure and separate location safe from loss, alteration, destruction or intermingling with other records and databases and to implement, use and maintain the most appropriate products, tools, measures and procedures to do so;
- (f) to restrict access to Personal Information to those of its directors, officers, employees, agents, partners, affiliates, volunteers or subcontractors who have a need to know it for the purpose of providing the Deliverables and who have been specifically authorized by RU Representative to have such access for the purpose of providing the Deliverables;
- (g) to implement other specific security measures that in the reasonable opinion of RU would improve the adequacy and effectiveness of the Supplier's measures to ensure the security and integrity of Personal Information and Records generally; and

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- (h) that any confidential information supplied to RU may be disclosed by RU where it is obligated to do so under FIPPA, by an order of a court or tribunal or pursuant to a legal proceeding;
- (i) and the provisions of this paragraph shall prevail over any inconsistent provisions in the Agreement.

**5.07 Survival**

The provisions of this Article shall survive any termination or expiry of the Agreement.

**ARTICLE 6 – INTELLECTUAL PROPERTY**

**6.01 RU Intellectual Property**

The Supplier agrees that all Intellectual Property and every other right, title and interest in and to all concepts, techniques, ideas, information and materials, however recorded, (including images and data) provided by RU to the Supplier shall remain the sole property of RU at all times.

**6.02 No Use of RU Insignia or Logo**

The Supplier shall not use any insignia or logo of RU except where required to provide the Deliverables, and only if it has received the prior written permission of RU to do so.

**6.03 Survival**

The obligations contained in this Article shall survive the termination or expiry of the Agreement.

**ARTICLE 7 – INDEMNITY AND INSURANCE**

**7.01 Supplier Indemnity**


The Supplier hereby agrees to indemnify, defend and hold harmless the Indemnified Parties from and against any and all liability, loss, costs, damages and expenses (including legal, expert and consultant fees), causes of action, actions, claims, demands, lawsuits or other proceedings, (collectively, “Claims”), by whomever made, sustained, incurred, brought or prosecuted, including for third party bodily injury (including death), personal injury and property damage, in any way based upon, occasioned by or attributable to anything done or omitted to be done by the Supplier, its subcontractors or their respective directors, officers, agents, employees, partners, affiliates, volunteers or independent contractors in the course of performance of the Supplier’s obligations under, or otherwise in connection with, the Agreement. The Supplier further agrees to indemnify and hold harmless the Indemnified Parties for any incidental, indirect, special or consequential damages, or any loss of use, revenue or profit, by any person, entity or organization, including, without limitation, RU, claimed or resulting from such Claims. The obligations contained in this paragraph shall survive the termination or expiry of the Agreement.

**7.02 Supplier’s Insurance**

The Supplier hereby agrees to put in effect and maintain insurance for the Term, at its own cost and expense, with insurers having a secure A.M. Best rating of B + or greater, or the equivalent, all the necessary and appropriate insurance that a prudent person in the business of the Supplier would maintain including, but not limited to, the following:

- (a) commercial general liability insurance on an occurrence basis for third party bodily injury, personal injury and property damage, to an inclusive limit of not less than **\$5,000,000** per occurrence and including products and completed operations liability The policy is to include the following:



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- RU as an additional named insured with respect to liability arising in the course of performance of the Supplier's obligations under, or otherwise in connection with, the Agreement
- Contractual liability coverage
- cross-liability and severability of interests clause
- employers liability coverage (or compliance with the paragraph below entitled "Proof of W.S.I.A. Coverage" is required)
- 30 day written notice of cancellation, termination or material change
- tenants legal liability coverage (if applicable and with suitable sub-limits)
- non-owned automobile coverage with blanket contractual coverage for hired automobiles

### 7.03 **Proof of Insurance**

The Supplier shall provide RU with proof of the insurance required by this Agreement in the form of valid certificates of insurance that reference this Agreement and confirm the required coverage as noted above in section 7.02 Supplier's Insurance, before the execution of the Agreement by RU, and renewal replacements on or before the expiry of any such insurance. Upon the request of RU, a copy of each insurance policy shall be made available to it. The Supplier shall ensure that each of its subcontractors obtains all the necessary and appropriate insurance that a prudent person in the business of the subcontractors would maintain and that RU is named as additional insured with respect to any liability arising in the course of performance of the subcontractor's obligations under the subcontract for the provision of the Deliverables.

### 7.04 **Proof of W.S.I.A. Coverage**


If the Supplier is subject to the Workplace Safety and Insurance Act ("W.S.I.A."), it shall submit a valid clearance certificate of W.S.I.A. coverage to RU prior to the execution of the Agreement by RU. In addition, the Supplier shall, from time to time at the request of RU, provide additional W.S.I.A. clearance certificates. The Supplier covenants and agrees to pay when due, and to ensure that each of its subcontractors pays when due, all amounts required to be paid by it/its subcontractors, from time to time during the Term, under the W.S.I.A., failing which RU shall have the right, in addition to and not in substitution for any other right it may have pursuant to the Agreement or otherwise at law or in equity, to pay to the Workplace Safety and Insurance Board any amount due pursuant to the W.S.I.A. and unpaid by the Supplier or its subcontractors and to deduct such amount from any amount due and owing from time to time to the Supplier pursuant to the Agreement together with all costs incurred by RU in connection therewith.

## **ARTICLE 8 – TERMINATION, EXPIRY AND EXTENSION**

### 8.01 **Immediate Termination of Agreement**

RU may immediately terminate the Agreement upon giving notice to the Supplier where:

- (a) the Supplier is adjudged bankrupt, makes a general assignment for the benefit of its creditors or a receiver is appointed on account of the Supplier's insolvency;
- (b) the Supplier breaches any provision in Article 5 (Confidentiality and FIPPA) of the Agreement;
- (c) the Supplier breaches the Conflict of Interest paragraph in Article 2 (Nature of Relationship Between University and Supplier) of the Agreement;

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- (d) the Supplier, prior to or after executing the Agreement, makes a material misrepresentation or omission or provides materially inaccurate information to RU;
- (e) the Supplier undergoes a change in control which adversely affects the Supplier's ability to satisfy some or all of its obligations under the Agreement;
- (f) the Supplier subcontracts for the provision of part or all of the Deliverables or assigns the Agreement without first obtaining the written approval of RU; or
- (g) the Supplier's acts or omissions constitute a substantial failure of performance;

and the above rights of termination are in addition to all other rights of termination available at law, or events of termination by operation of law.

**8.02 Dispute Resolution by Rectification Notice**

Subject to the above paragraph, where the Supplier fails to comply with any of its obligations under the Agreement, RU may issue a rectification notice to the Supplier setting out the manner and time-frame for rectification. Within seven (7) Business Days of receipt of that notice, the Supplier shall either: (a) comply with that rectification notice; or (b) provide a rectification plan satisfactory to RU. If the Supplier fails to either comply with that rectification notice or provide a satisfactory rectification plan, RU may immediately terminate the Agreement. Where the Supplier has been given a prior rectification notice, the same subsequent type of non-compliance by the Supplier shall allow RU to immediately terminate the Agreement.

**8.03 Termination on Notice**

RU reserves the right to terminate the Agreement, without cause, upon thirty (30) calendar day's prior notice to the Supplier.

**8.04 Supplier's Obligations on Termination**


On termination of the Agreement, the Supplier shall, in addition to its other obligations under the Agreement and at law:

- (a) at the request of RU, provide RU with any completed or partially completed Deliverables;
- (b) provide RU with a report detailing: (i) the current state of the provision of Deliverables by the Supplier at the date of termination; and (ii) any other information requested by RU pertaining to the provision of the Deliverables and performance of the Agreement;
- (c) execute such documentation as may be required by RU to give effect to the termination of the Agreement; and
- (d) comply with any other instructions provided by RU, including but not limited to instructions for facilitating the transfer of its obligations to another person.

This Section 8.04 shall survive any termination of the Agreement.

**8.05 Supplier's Payment Upon Termination**

On termination of the Agreement, RU shall only be responsible for the payment of the Deliverables provided under the Agreement up to and including the effective date of any termination. Termination shall not relieve the Supplier of its warranties and other responsibilities relating to the Deliverables performed or money paid. In addition to its

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other rights of hold back or set off, RU may hold back payment or set off against any payments owed if the Supplier fails to comply with its obligations on termination.

**8.06 Termination in Addition to Other Rights**

The express rights of termination in the Agreement are in addition to and shall in no way limit any rights or remedies of RU under the Agreement, at law or in equity.

**8.07 Expiry and Extension of Agreement**

The Agreement shall expire on the original Expiry Date, unless RU exercises its option to extend the Agreement for a period of up to the duration of the original term, such extension to be upon the same terms (including the Rates in effect at the time of extension), conditions and covenants contained in the Agreement, excepting the option to renew. The option shall be exercisable by RU giving notice to the Supplier not less than thirty (30) days prior to the original Expiry Date. The notice shall set forth the precise duration of the extension.

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**Schedule 1 - Schedule of Deliverables, Rates and Supplementary Provisions**

*[To be completed after selection of the Successful Supplier]*

**A. Description of Deliverables**

**B. Rates and Disbursements**

**B.1 Maximum Fee**

Notwithstanding anything else in the Agreement, the total amount payable by the RU to the Supplier under the Agreement shall not exceed [insert maximum Agreement amount] (\$xxx).

**Note: no signatures are required until Successful Supplier has been selected and Agreement language agreed to and completed.**