

## **Section 1: Purpose/Background**

The purpose of this Request for Proposal is to identify a digital platform that will serve as a centralized location for delivering, curating, and providing access to statewide educational resources and professional development opportunities. The platform must be able to host new and existing content, offering tools to support the curation and organization of resources from a variety of sources.

This digital platform provides a robust and flexible library of instructional materials and pedagogical resources. It supports both live and on-demand formats to accommodate the schedule needs of adult learners. The platform supports statewide distribution of resources as well as the ability to provide limited access to specific groups identified by user domain or other methods. This ensures both statewide and localized professional development needs can be met effectively. Original material created and distributed by staff of the IDOE through the platform is the property of the IDOE and otherwise shall be governed by fair use and copyright laws.

A critical function of the platform is the ability to track user engagement and completion of professional development activities in real time. This tracking informs the allocation of professional growth points, which are tied to educator licensing requirements via integration with the state licensing platform. The platform must be able to track user engagement and completion of activities both statewide and for local entities, providing the necessary report.

The platform must feature the ability to generate comprehensive data. This includes current user counts, roles, and locations, as well as accompanying data trends, insights into page views of statewide and local resources, participation and completion of coursework, and domain-specific engagement with content.

The necessary features of each component are delineated in Section 2.

## **Section 2: Contractor Responsibilities/Deliverables**

IDOE requires a vendor that can provide evidence of successful, large-scale professional learning platform implementation used by up to 500,000 users. The vendor must have at least three years of experience implementing a state-wide professional The contractor's solution must comply with the IOT Risk and Authorization Management Program Policy for Cloud Offerings (Policy P.05), which can be found at <https://www.in.gov/iot/iot-vendor-engagement/>.

NOTE: The contractor must achieve and maintain the Minimum Verified Security Designation Level of [*Determine needed level*: GovRAMP Core at the Moderate Impact Level / GovRAMP Authorized at the Moderate Impact Level / GovRAMP Authorized + CJIS Overlay at the Moderate Impact Level].

The contractor must obtain this designation within eighteen (18) months of the effective date of the contract or within one-half of the contract term, whichever period is shorter. Artifacts showing previous successful implementations must be provided within each of the seven following areas.

## 1. User Management & Access Control

The vendor provides examples and artifacts of previous successful platform implementations showing the platform can do each of the following:

- a. **Onboard as many as 1,000 new users per day** - The platform must handle a rapid onboarding rate during key times of the year. This ensures the platform can meet growing educational demand and achieve widespread adoption across Indiana.
- b. **Audit user data weekly by domain** - User accounts are audited on a weekly basis to ensure accounts are limited to Indiana users and permissible roles determined by IDOE (i.e. educators, parents/caregivers, administrators).
- c. **Feature a customized dashboard for each individual user based on interest areas** - Personalized dashboards must display the most relevant content for each educator's specific role and interests.
- d. **Host individual resources** – Platform content must be able to include IDOE-created links, existing websites, and workshop recordings as individual resources for user access. The platform must be able to show resource completion by users.
- e. **Host collections of resources** – The platform must have the capability to organize individual resources into collections, providing organized access to users. The platform must be able to show collection completion by users.
- f. **Collection Curation** - The vendor must collaborate with IDOE representatives to curate collections of existing resources about educational topics or tailored content to address specific Indiana educational needs requested by users or IDOE. Content must meet the requirements of IDOE's [Guidance for Vetting High Quality Digital Resources](https://drive.google.com/file/d/1Ej0jc_kTPSI9C33MeBrK8xcA39jeyVKC/view) ([https://drive.google.com/file/d/1Ej0jc\\_kTPSI9C33MeBrK8xcA39jeyVKC/view](https://drive.google.com/file/d/1Ej0jc_kTPSI9C33MeBrK8xcA39jeyVKC/view)).
- g. **Provide both public access to resources, collections, and specialized hubs, and when required, private access and the ability to restrict access in two ways, by domain and by a provided list of users** - Domain-based access and control protects content and ensures only authorized users from specific organizations can access certain materials. The platform must show previous examples of being able to provide the ability to restrict access based on a provided list of users or by email domain. Other resources need to be accessed by all users statewide.
- h. **Provide a mechanism to allow school corporations to upload and curate their own resources, including the ability to group these resources by topic** - Administrative privileges must allow organizations to manage their own content and create collections specific to their needs. Users outside of a specific school corporation or list of users must be prevented from accessing private content.
- i. **Provide a mechanism to allow school corporations to issue corporation-specific completion reports** - This mechanism must allow organizations to run reports that include staff platform engagement and professional development progress.
- j. **House profiles of every user in the platform with the ability to track completed content, including a mechanism that tracks professional growth points** - Individual

user profiles must have personalized professional development tracking with the ability for the user to download and print completion certificates that are time and date-specific. The platform must have the ability to merge accounts or change profiles based on the movement of users to other domains.

## 2. Technology Requirements

- a. **Licensing Platform Integration** - The platform must have the capability to integrate with Indiana's licensing platform (<https://license.doe.in.gov/>) to automatically share applicable data, providing educators with a seamless process for redeeming professional growth points towards the license renewal process. Integration must be in place by July 1, 2027.
  - The vendor must commit to a process to integrate with our educator licensing system, including stages of planning, testing, troubleshooting, and launching this connection. This process will include work with the provider of our educator licensing system and will require a completion record of a user's professional development event to be passed into the user account in the licensing platform.
  - The State has robust and comprehensive data transmission standards that operate enterprise wide. The IOT established and maintains these standards, which support IOT's data exchange and API-led strategies for the State. The Contractor's solution must support the State's standard API and file transfer methods to facilitate secure data transmission. The State's standardized data transmission technologies are the MuleSoft API Management and GoAnywhere Managed File Transfer (MFT) services. See <https://www.in.gov/iot/policies-procedures-and-standards/applications-standards/>
- b. **Data Security Protocols** - The platform should adhere to Secure by Design and Secure by Default standards ([https://www.cisa.gov/sites/default/files/2023-06/principles\\_approaches\\_for\\_security-by-design-default\\_508c.pdf](https://www.cisa.gov/sites/default/files/2023-06/principles_approaches_for_security-by-design-default_508c.pdf)) to ensure all user data is safely stored and secure.
- c. **Support single sign-on (SSO)** - The proposed solution is expected to integrate with Access Indiana. The IN.gov Program (<https://www.in.gov/inwp/>) is tasked with implementing a single sign-on authentication mechanism and Identity Provider for online applications for the State of Indiana, referred to as Access Indiana. The benefits of a standard authentication solution, integration strategy, integration process, and more can be found at Access Indiana Authentication (<https://www.in.gov/inwp/applications/authentication/>).
- d. **Accessibility Guidelines** - The platform must meet current accessibility guidelines. Web Content Accessibility Guidelines (WCAG) 2.1 Level AA are required by a Justice Dept. Ruling or have a plan to comply by April 26, 2026.
- e. **Software Updates** - The vendor will perform routine maintenance and updates on software to provide a secure and user-friendly learning experience.
- f. **Browser Requirements** – The platform must be fully accessible via standard internet browsers, including, at a minimum, Chrome, Edge, Safari, and Firefox.
  - The platform should support new, stable browser versions within no more than six months of their release.
  - The platform should support usage of at least two prior stable versions of the browser software or all stable versions with the prior year.

- The platform should not rely on Flash, Java, or other browser plug-ins.
  - The platform should not rely on unusual or customized browser or network configuration requirements.
  - The platform should be usable from all types of mobile devices (tablets, phones, etc.). The platform must have a fully responsive design, adapting automatically to different screen sizes and orientations.
  - The platform should demonstrate an intentional approach to interoperability, including data exchange (with standard protocols and/or frameworks) with other systems, e.g. compliance with Open Badge, Common Cartridge, and Learning Tools Interoperability (LTI) standards.
- g. **Language Support** – The platform incorporates language translation features to ensure access for all users.
- h. **Archival Status** - Upon conclusion of the contract, the platform will maintain minimal functionality in an archival status for no more than 1 year without a renewal.
- i. **Artificial Intelligence (AI)** - The State of Indiana has adopted an enterprise-level policy governing the use of Artificial Intelligence (AI) within state government. The State of Indiana AI Policy is issued and monitored by the Office of the Chief Data Officer (OCDO), in cooperation with the Chief Privacy Officer (CPO) and the Management Performance Hub (MPH). In complement the AI Policy, the State Agency Artificial Intelligence Systems Standard outlines the rationale behind the AI Readiness Assessment process required for the implementation or any use of AI by a state agency. The standard outlines the requirement for the submission of a Readiness Assessment Questionnaire prior to implementation or use of an AI tool or system. Any proposed solution meeting these requirements must support the State's AI Policy and follow the AI Readiness Assessment Process. See <https://www.in.gov/mpH/AI/> for more detailed information.
- Vendor should outline if the proposed solution utilizes any form of artificial intelligence (AI), as defined by IC 4-13.1-5-1 (<https://iga.in.gov/laws/2024/ic/titles/4#4-13.1-5-1>). If so, please address the following:
    - i. How is AI utilized within the solution?
    - ii. Can the AI functionality be disabled without impacting the overall functionality or performance of the proposed solution?
    - iii. Can the State enable/disable the AI functionality, or is that controlled by the solution/implementation provider?
    - iv. If disabling AI does result in limitations, please specify what those limitations are.
    - v. Is there a plan to introduce AI into the solution in the next four (4) years if AI is not already utilized OR is there a plan to expand AI in the solution if AI is already utilized?
    - vi. If AI is not currently used in the proposed solution AND there are no plans currently to add AI to the proposed solution, respond with confirmation of understanding in the response area below.
  - **Vendor Development During Implementation and Support:** Vendors should outline if developers use artificial intelligence (AI), as defined by IC 4-12.1-5-1 (<https://iga.in.gov/laws/2024/ic/titles/4#4-13.1-5-1>) to augment their work. If so, please address the following:

- vii. Describe the degree to which your developers use AI to augment their work.
- viii. Describe the extent to which AI tools for development work are proposed for use in this project.
- ix. Can the AI functionality be disabled without impacting the development of the proposed solution?
- x. If disabling AI does impact the development of the proposed solution, please specify what those impacts are.
- xi. Is there a plan to introduce AI as part of the development of the proposed solution in the next four (4) years if AI is not already utilized in development OR is there a plan to expand AI as part of the development if AI is already utilized?
- xii. If AI is not currently used by developers and there are no plans currently to leverage AI as part of development during the project or in Maintenance & Operations, respond with confirmation of understanding in the response area below.

### 3. Communication & Marketing Features

The platform must supply evidence and artifacts of existing platform features to support community engagement, including:

- a. Communities of Practice/Forums for Teachers, Pre-Service Educators, Parents, Administrators, etc.
  - The platform must have online communities to facilitate peer learning and collaborative problem-solving.
  - IDOE must have the ability to post blog-like articles, which are automatically emailed directly to users of a specific community of practice.
  - Participants must be able to have the opportunity to make comments, respond to requests, and ask questions.
  - Targeted communication channels must efficiently distribute relevant information to specific stakeholder groups or all users of the platform.
- b. Custom Urgent/Timely marketing
  - Vendor must have a mechanism to provide platform announcements upon user authentication to communicate timely opportunities, convey immediate messages, or require user action on specified topics.

### 4. Professional Development & Training

The vendor's platform must show existing evidence and high-quality examples of the capabilities listed below that facilitate professional development for Indiana educators, administrators, and/or caregivers.

- a. **Facilitation of the professional development platform** - A human facilitator must be on hand to facilitate every live, virtual professional development session. This facilitator must have the ability to:

- interact with live attendees
- provide live attendance data to IDOE
- coach presenters on effective engagement strategies
- provide technical support to presenters
- provide technical support to attendees
- collaborate with IDOE regarding session format
- appear in sessions to introduce and/or wrap up sessions as needed
- b. **Live webinar facilitation technology** - The platform must use streaming technology that enables effective real-time professional development delivery, including the capability for attendees to interact with the presenter, the capability for the platform facilitator to chat privately in written format with the presenter, and the capability for the platform facilitator to chat privately in written format with an IDOE representative.
- c. **Platform to register, track, and communicate with attendees** - The platform must have event management capabilities that streamline the registration process and provide users with the necessary links, reminders (both 24 hours and one hour prior to the event), and any prerequisite content provided by the presenter.
- d. **Calendar integration and communication** - The platform must integrate into commonly used calendar systems (support the iCal standard), including Google, Apple, and Outlook. Dates and times for professional development sessions will be selected by IDOE.
- e. **Record, edit, and publish webinars** - Webinar recordings must be
  - published within 48 hours of concluding live,
  - available on-demand indefinitely, or until otherwise stated by an IDOE representative,
  - edited to eliminate significant disruptions within the turnaround time,
  - edited as requested by IDOE,
  - published or unpublished as requested by IDOE
  - published with session materials linked or attached to the location where the recording is housed.
- f. **Onboarding materials and personalized email support for presenters** - Comprehensive presenter support must be provided to ensure successful webinar delivery. Support must include written and video instructions available upon request.
- g. **Mechanism to provide professional growth points during virtual sessions** - The platform must have a mechanism to provide professional growth points to both live attendees and those watching the recording. The mechanism for live attendees must be unique for each session, ensuring accurate recording and preventing fraudulent claiming of points.
- h. **Mechanism to provide professional growth points for conference or special event attendance** - Attendance documentation must allow educators to receive credit for in-person events, and that credit must be recorded in the same platform environment as virtual workshops and other online content.

## 5. Content Organization & Resource Management

The vendor's platform provides evidence of previous implementations showing it supports each of the following content-related features:

- a. **Established protocol for adding content to the platform**
  - The process for adding content to the platform must take no longer than one week.
  - IDOE staff must have the ability to add content to the platform directly. Instructions for IDOE users must be available.
  - A dashboard of submissions to the platform must be available for the IDOE Digital Learning Team, providing insight into all IDOE submissions.
- b. **Presence of specialized hubs to serve as landing pages and organizational structures for: computer science, nutrition, literacy, parents, and assessment**
  - Subject-specific hubs must enable educators to quickly locate relevant resources without wading through unrelated materials.
  - The platform must have the ability to add additional hubs at the discretion of IDOE.
  - The platform must have the ability to limit hub access to specific users as requested by IDOE.
- c. **Ability to filter resources** - The platform must provide robust filtering capabilities to eliminate irrelevant search results and deliver highly relevant educational materials. Effective filtering must include options for audience, academic subject area, and keywords as defined by the Indiana Department of Education (IDOE). To support this functionality, all resources must be tagged with comprehensive, high-quality metadata to ensure accuracy and precision in search and categorization.
- d. **Trending and newest resource lists** - The platform must include features that highlight trending and new content to assist users in discovering resources they might otherwise miss.
- e. **Ability to bookmark resources for future viewing** - The platform provides a feature to allow users to mark resources of interest for future viewing.
- f. **Ability to bookmark favorite resources** - The platform provides a feature to allow users to save resources as favorites for easy repeat access. The platform is also able to suggest new or existing content based on a user's profile preferences or previously viewed content.
- g. **Regular audits of resources** - Regular quality checks maintain the platform's integrity. Vendor must have the capability to remove items as requested by IDOE within 24 hours.
- h. **Course development and management** - The platform must include the ability to design structured learning pathways to provide comprehensive skill development opportunities that go beyond individual resource consumption and must be within a high-quality online course format, embedding the types of learning experiences associated with high-quality adult learning. Instructional design and hosting of custom courses must be able to be provided by the platform vendor, working collaboratively with IDOE and/or a third-party content provider. Standards-based content ingestion and export should be a capability of the platform. Course content must have the capability to be limited to a specific group of users. Courses must include:
  - response opportunities
  - embedded opportunities to engage with others taking the course
  - active engagement with the content
  - checks for understanding
  - the opportunity to engage with the instructor/facilitator of the course content

- design that follows adult learning theory and a chosen framework for high-quality asynchronous online learning
- multimedia integration of content, including embedded videos, slides, images, etc. that follow accessibility standards
- instructions for users on how to engage with the course content
- ability to track professional growth points earned from course completion
- account for the user experience design
- the ability to provide notifications or reminders to learners
- the ability to view, download, and share certificates from completed course
- the ability to provide course participation and completion records to IDOE

## 6. Data Analytics & Reporting

The vendor's platform provides evidence and artifacts showing previous successful implementations with data analytics that include the following:

- a. **Dashboard with comprehensive tracking and analytics**
  - The platform provides a visual data representation that provides at-a-glance insights that enable quick, informed decision-making for platform management and resource allocation.
  - The dashboard is updated daily and includes data trends regarding new users, returning users, user locations, user roles, and user interests.
  - IDOE users have access to all dashboards.
- b. **Users by domain, school type, and grade level** - The platform must provide user data breakdowns by domain, school type, and grade level.
- c. **Views by resources** - The platform must provide pageview data for resources, collections, hubs, and other pages within the platform. Pageview reports must be able to be viewed within 24 hours and have export capabilities.
- d. **Feedback forms** - Platform includes a mechanism to collect feedback, capture direct user input, rate satisfaction levels, and provide an opportunity for users to suggest topics needing more attention after interacting with live or on-demand webinars. IDOE staff must have access to these feedback forms to inform future projects.

## 7. Migration & Transition

The platform shows previous experience and success with these migration tasks. The vendor will create a data migration plan that must be approved before work begins.

The vendor should describe your company's overall data migration strategy, plan, and methodology. Include data extraction, cleansing, mapping, and conversion, and testing.

- **Migrate 3,000+ existing resources by December 1, 2026** - The platform must migrate existing resources to preserve content and prevent loss during platform transitions, keeping the form and function of the existing solution. Existing resources include video, text, and additional links. At least 50% of the migration of resources must be complete within 90 days.



- **Migrate all user data by December 1, 2026** - The platform must migrate historical data, maintaining user preferences and engagement patterns, ensuring continuity of the user experience.
- **Migrate existing courses, including current completion records** - The platform must protect course content and completion records from being lost during platform changes.
- **Hosting new items by July 1, 2026** - The platform has the capability to host newly submitted resources.
- **IDOE staff platform trainings** - Within 30 days of the start of the contract, the platform must provide all necessary tutorials and user guides for IDOE staff, as well as conduct in-person or virtual meetings to train IDOE staff on how to use the platform. Tutorials about the features of the platform to support Indiana educators and IDOE staff are available. Tutorials might include text and video formats.
- **Onboarding support for educators and caregivers** - Training and outreach materials in the form of text and videos must be available and must be specific to audiences including teachers, building/corporation leadership, and caregivers.

## 8. Project Management & Support

The vendor should provide a document to describe your company's project management approach and methodology for this project. This should be a high-level document that pulls everything together.

The vendor commits to the following project management protocols:

- Minimum of biweekly status update meetings
- Creation of the agenda for these meetings at least one week prior
- Additional project planning and status meetings upon request
- Participation in IDOE training aligned with communication protocols
- Clear vendor communication and collaboration channels
- Establishment of a main point of contact.
- Establish a method of communication to ensure responses the same business day.
- Creation of a quarterly report consisting of key data points related to the platform.

If the State decides to add Independent Verification & Validation services as part of this engagement, the contractor will copy the Indiana Department of Administration (IDOA) – Independent Verification & Validation (IV&V) team member(s) on all project related communications (emails, meeting invites, collaboration tools, etc.) and will grant access to all documents and deliverables throughout the term of the contract.

## 9. Timeline of Key Deliverables

The project go-live date is set for July 1, 2026. Maintaining project timelines is critical to cost and overall project success. Due to the nature of the project, failure to meet timelines will result in a disruption of service fee. If the Vendor fails to achieve the Go-Live Date, the Vendor shall be assessed a disruption-of-service fee of \$2,000 per calendar day beyond July 1, 2026, until full, satisfactory implementation is achieved. This fee shall be

considered liquidated damages, not a penalty, and will be deducted from amounts to the Vendor.

- The vendor should submit a proposed timeline for project implementation, including all major parts of the process. This should include your company's tasks, sub-contractor owned tasks (if applicable), and State-owned tasks in an integrated fashion. Include key tasks as part of development, testing, training, data conversion, other key areas of the project.
- Vendor should describe your company's method of creating the schedule and the method and frequency of maintaining the schedule throughout the project.
- Vendor should identify and describe the tool(s) your company uses to create and manage the schedule.
- Vendor should describe methods your company uses to measure schedule performance and how you will know when to escalate schedule risk.

## **10. Communication and Scheduled Meetings**

Vendors should describe your company's recommended communication strategy for this project. Provide an example of the communication plan for this project to include roles responsibilities, communication types, methods of delivery, audiences to receive, timing, etc. Outline how your company will monitor and confirm communications are working and adjust as needed.

**Project Kickoff Meeting:** A kickoff meeting is required for project initiation. The purpose of the kickoff meeting is to introduce key stakeholders, points of contact for the project, address vendor or IDOE questions/concerns, provide an update on the contract status, and discuss next steps for project implementation.

- The contractor will schedule and facilitate one (1) project kickoff meeting.
- The kickoff meeting is preferred to take place as a virtual meeting (Microsoft Teams is preferred but not required; if the vendor opts to use another platform, that platform must be accessible to IDOE at no cost via a web browser with no additional software or extensions/plugins required). An in-person meeting is an option, though not at the State's expense.
- The contractor will draft an agenda and provide it to IDOE at least 72 hours in advance of the meeting for review and approval.
- The contractor must provide meeting minutes for IDOE's review within 24 hours of the meeting's completion for review and approval.

**Project Status Meetings:** The contractor must communicate regularly with IDOE. Communication expectations include:

- Attending scheduled virtual meetings to provide status updates, answer questions, and resolve differences.
- Meetings are established bi-weekly; IDOE may request more frequent meetings, especially in times of transition.

- Microsoft Teams is preferred for all virtual meetings but is not required; if the vendor opts to use another platform, that platform must be accessible to IDOE at no cost via a web browser with no additional software or extensions/plugins required.

#### Communication Regarding Site Updates

- Due to the nature of the content in the platform, prompt responsiveness is required. Site update response times are indicated below
  - Adding a new resource or group of resources - within five business days
  - Removing a previously published resource - same day if asked before 10 a.m.; otherwise, within 24 hours
  - Revising an existing resource - within 48 hours
  - Publishing recordings of live sessions with necessary editing - within 48 hours
  - Administrative privilege requests - within 48 hours
  - Requests for platform data - within 24 hours
  - Insights into user data - always available via a dashboard

### 11. Staff Qualifications

At a minimum, the following positions are required: Platform Implementation Specialist, Director/Manager, Professional Development Facilitator, Support Agent, and Web Architect.

- Platform Implementation Specialist
  - The Platform Implementation Specialist role will engage with Indiana school leaders and coaches to design implementation strategies that will maximize stakeholder access and learning within the platform. This role will connect with schools through virtual visits, consultation sessions, and special events.
  - The Platform Implementation Specialist will provide a weekly engagement email to users of the platform and maintain the social media presence as the IDOE sees fit.
  - Quarterly engagement reports will be constructed for easy sharing and presentation.
  - Any vendor resource serving in the Platform Implementation Specialist role must be approved by IDOE and selected through a collaborative process.

The vendor must provide staff member names and resumes of staff members, highlighting relevant experience of this work, who will be core team key personnel. It is expected that the vendor would include staff well-versed in relevant areas, including professional development, public relations, video production, and website development. At a minimum, this core team of key personnel shall be listed in the Respondent's proposal. Identifying core team key personnel (i.e., those assigned more than 20% FTE) as specific individuals is a mandatory requirement for the work to be performed under this contract and is subject to approval by IDOE.

The vendor's staff members responsible for supporting educators with the professional development platform must have relevant degrees or licenses, as well as a minimum of three years' experience in the education field.

### 12. Testing

Test strategy and execution are critical to current and future quality and usability of any solution. Provide a test plan / strategy document that among other things describes the overall testing process and the types of testing that may be in scope before functionality is implemented.

- Describe and provide process flow of the defect management process.
- Where will test cases/scripts be captured and maintained.
- Provide an example of a Requirements Traceability Matrix used on a similar project.
- Identify and describe any automated testing tools that will be used.
- What roles / responsibilities do you see for your company and for the State in testing the application?
- Identify and describe the testing environment(s) that your company recommends as part of the project and why.

### **13. Organization Change Management (OCM)**

Vendors should outline what experience your company has with OCM activities for similar projects. Describe your company's expectations and recommendations for OCM for this project. Outline what OCM risks the State can expect based on your company's experience and what mitigation strategies your company recommends for these risks.