



Evaluating Vendor Capabilities through **RFP Use Cases**

A Rubric to Develop and Evaluate Use Cases for RFPs

Integrating Use Cases into the RFP Process

Vendors Must Demonstrate the Capabilities of Their Product to Stakeholders

How to Use This Guide

Including use cases in an RFP is a strategy that ensures that any technology brought to campus meets the needs of campus stakeholders.

The University of Wisconsin System is a model for this tactic. By compiling use cases to include in the RFP, the University of Wisconsin System purchased a new Digital Learning Environment that had all of the capabilities that campus constituents required.

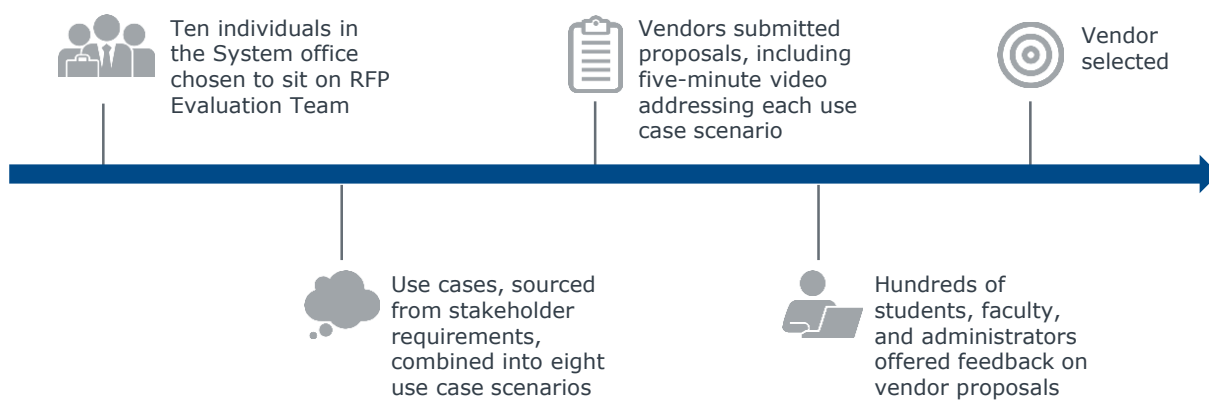
Using University of Wisconsin System's RFP as a model, this guide:

1. Explains the process to incorporate use cases into your RFP;
2. Provides eight examples of use case scenarios compiled by the University of Wisconsin System to evaluate vendors in real-life contexts relevant to their stakeholders;
3. Includes a rubric for you to evaluate use cases that you might include in an RFP.

A Vendor Selection Process Rooted in Constituent Needs

As the University of Wisconsin System's LMS contract drew to an end in 2016, the System prepared an RFP for a new Digital Learning Environment (DLE) to take its place. To create an RFP, the System completed a system-wide needs analyses and requirements gathering to identify stakeholder needs. Use cases were derived from the requirements gathered from campus stakeholders and combined into "use case scenarios," which were then included in the RFP. Vendors were required to demonstrate in their proposal how their product met the needs articulated in each use case scenario. Stakeholders evaluated vendors' proposals and provided feedback as Subject Matter Experts. Then, the RFP Evaluation Team chose a vendor.

Wisconsin System's DLE Selection Process



8

Total # of
Use Case
Scenarios

4

Addressed
Instructor
Perspective

4

Addressed
Student
Perspective

2

Addressed
Administrative
Perspective

1

Addressed
Guest
Perspective

Anatomy of a Successful RFP Use Case

Provide Clear Instructions to Vendors Submitting Proposals

Below are the instructions included in the Wisconsin System RFP, which explained to vendors how they must reply to each of the eight use case scenarios in their proposal:

“

For each scenario below, **proposer must submit a narrative describing how its proposed solution would address the given scenario, and a video or animation of less than 5 minutes duration illustrating the solution** described in the narrative.

Describe in detail any ways in which your proposed solution differs from the assumption that each proposed solution includes a common, industry-wide, base, LMS toolset (e.g., course news area, calendar, content repository, assignment-submission tool, quiz tool, discussion tool, and gradebook).

”

Use Case Scenarios Must Include All Relevant Details

Here is the first scenario that Wisconsin System included in their RFP, written from an instructor’s perspective. It provides a detailed overview of the situation with clear questions posed to vendors.

Scenario #1
Instructor Perspective

Dr. Smith teaches a large, 120 student, Introduction to Biology course every semester. She completely redesigned her course in Fall 2016 using your solution. Dr. Smith is teaching the same course in Spring 2017.

She would like to set up and run the Spring 2016 course just as she did during the Fall 2016 semester. However, Dr. Smith also sets up her course so that one piece or set of content (i.e., course file, link, quiz, discussion, etc.) must be accessed and successfully completed by the student before the student can move on to the next set of content.

How would Dr. Smith leverage the learning environment to replicate her Fall 2016 course in creating her in Spring 2017 course? What best practices should Dr. Smith use to make modifications to the Spring 2017 course in an effective and efficient manner? If the content organization, gradebook logic, quizzes, and discussions are the same for both courses, what manual changes would the instructor need to make to ensure the course is ready for Spring 2017?

Lays out a complex situation that an instructor may face in real-life context.

Ends with several broad questions that the vendor must solve with their product.

Sets up a detailed, stakeholder-specific context for the scenario.

This situation was identified by faculty across the system as an issue of importance.

Additional Wisconsin System Use Case Examples

Scenario #2: Student and Instructor Perspectives

It is imperative that the learning environment, with or without third party tools integrated, fosters and supports collaboration and communication between and among instructors and students. Dr. Jones teaches a Business Management course that is structured around group work, and includes a capstone group project. The 35-student course is typically self-divided by students into five groups, with seven students in each group.

Part A: To facilitate group work on the project, Dr. Jones requires the ability to use your solution to support the following activities electronically:

- Distribution of course materials at the group level (not to an individual student or the class).
- Facilitation of two-way communication between and among students, groups and the instructor on a synchronous and asynchronous basis, in written, audio and video formats.
- Creation and Administration of assessments and feedback (including grading) at the group level.

Part B: Students require the ability to use your solution to support the following activities electronically:

- Submission of group work
- Facilitation of two-way communication between and among students, groups and the instructor on an synchronous and asynchronous basis, in written, audio and video formats
- Peer (group to group) feedback

How does your solution support group work as outlined in Parts A & B?

Scenario #3: Guest Perspective

Using Scenario 2 as a basis, how are guests (those not affiliated with the UW System) able to communicate and interact with students, groups, and instructors using your solution?

Scenario #4: Administrator Perspective

Jen Atkins is a Learning Management System administrator for one of the UW system institutions. She is charged with maintaining courses, including fulfilling instructor requests for courses that are not automatically created using the institution's student information system (SIS) to populate course and user data. Ms. Atkins also fulfills many requests for data, including detailed statistics about system and tool usage and user behavior within the environment. She also regularly modifies, combines and deletes user roles and user permissions.

How can your solution be leveraged effectively and efficiently to support Jen in fulfilling her responsibilities to manage and maintain the learning environment, including incorporation of user data that is not brought in through an SIS integration (non-matriculated students, for example), generation of usage statistics, maintenance of user roles and permissions, as well as management of the course creation, curation, and archiving process?

Scenario #5: Student and Instructor Perspectives

Professor Denton requires that her engineering students learn and use mathematical and scientific expressions. Show how equation creation and editing by both instructors and students can be made available within your solutions assessment toolset or through integration with a third-party solution.

Additional Wisconsin System Use Case Examples

Scenario #6: Student and Instructor Perspectives

Students live mobile lives and expect their learning environment to support anytime, anywhere access to their coursework. Instructors increasingly use active teaching techniques that include activities outside the classroom.

Anthony Yang is an instructor in the Art Department and often assigns activities that require the student to be in non-classroom settings, such as museums, parks, and other public spaces. How does your solution, either with or without the integration of 3rd-party tools, support a student's mobile access to the solution's toolset to:

- Produce and upload a photo or video assignment?
- Complete an onsite quiz assessment?
- Create an onsite reflection discussion post using a wireless, mobile device (e.g., "smart" phone, tablet, laptop, etc.)?

In your narrative, include a description of how your product's mobility could be negatively impacted by environmental factors (i.e., factors outside the control of your company, your product or the client product administrator(s)).

Scenario #7: Administrator Perspective

Ray is the Financial Aid officer at his campus. Per federal regulations, higher education institutions that support the provision of financial aid for students are required to monitor student academic activity, as defined by the United States Department of Education.

To meet federal regulations, Ray needs the ability to identify students enrolled in an online course at his institution who have not had a sufficient level of student activity (e.g., create a discussion posting, complete a quiz, engage with the instructor, etc.) in a course during the current term. Demonstrate how your company's solution can be leveraged to meet Ray's need for reliable "student activity" information he needs for federal regulation compliance.

Scenario #8: Student Perspective

The look and feel of many learning environments are instructor or administrator controlled. What are your recommended best practices for leveraging your solution to accommodate main stream, third-party assistive tools that support all learners?

UWS is very interested in learning about the flexibility of your solution so that it can accommodate individual learning differences. It is particularly important that the learning environment be enabled to support differing learning styles, accommodate low vision, deaf, hard of hearing, or other varying student abilities.

What best practices do you recommend so a student with low vision can modify your solution's learning environment interface to meet his or her needs? To address specific student needs, describe how your solution supports instructor configuration of the time allotted for completion of a course activity at the individual, student level.

Evaluating RFP Use Case Quality

This rubric is a tool to help you evaluate use cases that you have developed for a learning technology RFP. You can measure use cases against the four criteria below.

Criterion	Does Not Meet Requirements	Partially Meets Requirements	Fully Meets Requirements
Stakeholder Input During Use Case Development	Campus stakeholders are not included in the use case development process.	Only select campus stakeholders are asked what they require from a new vendor.	A variety of campus stakeholders are asked what they require from a new vendor, and each of these perspectives is included in the compilation of use cases to be included in the RFP.
Stakeholder Feedback on Vendor Proposals	Stakeholders have no opportunity to review proposal submissions prior to vendor selection.	Stakeholders can review proposal submissions, but there is no formal process to submit feedback prior to vendor selection. OR Only some stakeholders are given the chance to review proposal submissions and provide formal feedback prior to vendor selection.	All stakeholders are invited to review proposal submissions and provide formal feedback, which will then be used to inform vendor selection.
Specificity of Use Case Context	The use case does not present a situation specific to one or more stakeholder perspectives. It is unclear who would be using the tool, and in what context.	Insufficient context is provided within the use case, making it unclear: Which stakeholder(s) seek to use the product, or; How the stakeholder(s) need to leverage the product in the setting.	The use case presents a context in which one or more specific stakeholders seek to use the product to achieve a particular objective. Example: A student (<i>specific stakeholder</i>) needs to use the tool to register for classes (<i>particular objective</i>), while studying abroad (<i>additional context</i>).
Clarity of Questions Posed in Use Case	The use case does not ask vendors a clear question to which they must respond.	The use case poses one or more questions to vendors, however: The question is not specific enough, leaving the vendor unsure of the necessary scope of their response. OR The question is so narrow (e.g., asking about a specific feature) that not all qualified vendors are capable of responding.	Each question presented in the use case is specific enough to help guide the vendor's response but also broad enough to apply to a diverse set of products. Example: "How can your solution be leveraged (<i>broad enough to permit diverse responses</i>) to support Instructor A in creating a quiz for a select group of students within a course (<i>specific enough to address the particular use case scenario</i>)?"