



**REQUEST FOR PROPOSAL E-LEARNING SERVICES**

**Questions and Answers #4**

**April 24, 2023**

1. **The State Bar of California states “To be considered responsive, a proposal must...referenced by table number...”** What is meant by being reference by table number? What is the State Bar expecting to see regarding this requirement?
  - a. The reference by table number refers to the proposal having a table of contents, which list of all the things that are included in the proposal. Then, each component of the proposal needs to be referenced with a table number and a page number, so people can easily find them.
2. The RFP says, “the State Bar is currently developing curriculum outlines.” What level of detail do those outlines include, so we can understand the level of additional design work needed in the outlining stage?
  - a. The level of detail in the curriculum outlines is comprehensive substantive content that requires updates due to changes in the laws. The curriculum outlines also include clarification in modules that may have been unclear to the learner. The State Bar is particularly interested a vendor that has new ideas and teaching methods to keep the curriculum fresh and engaging.
3. For updating the existing courses, we understand the intent is to update visuals, refresh outdated learning content, and potentially change some modalities. Are you looking for a vendor to update the source files within the original authoring tool for these courses or are you open to transferring this content to a new authoring tool?
  - a. The State Bar does not have a preference as to whether the source files will be updated or if the content is transferred a new authoring tool.
4. Could the State Bar elaborate further on this request: **Proposals should include up to three (3) samples of outlines or worksheets that you provide to clients for them to structure their content around.**
  - a. Proposals for the project should include up to three examples of outlines or worksheets that you typically provide to clients to help them organize and structure their content. These samples should demonstrate your expertise and set the expectations for what the State Bar can expect from your services. The samples will also give the State Bar an idea of how each vendor approaches projects and how each vendor can help the State Bar achieve their goals.
5. Questions specific to the Statement of Work:

- a. Are the renewal periods intended to cover additional work outside of the requested scope in the RFP, or are they intended to be possible time extensions to complete the requested scope?
    - i. The renewal periods are intended to cover additional work outside of the requested scope in the RFP.
  - b. How does the maintenance agreement relate to the scope of the courses listed in the RFP? Are these updates for ADA compliance in addition to content updates related to course content changes described in the attachment? Or are the ADA compliance updates intended to be a separate effort for ongoing and parallel work on courses that may or may not include the courses named in the RFP attachment?
    - i. The maintenance agreement relates to the updates for ADA compliance to content updates.
  - c. What are the updates needed for ADA compliance, and which courses require these updates?
    - i. The courses currently comply with ADA by offering a transcript document and a tab on the menu bar that displays the audio text for each screen, however we would like to explore implementing closed captioning into the course. This would need to be done for all courses.
  - d. Is the course content in English only? What other languages are required?
    - i. Yes, the course content is in English only, no other languages are required.
- 6. Question regarding samples:
  - a. Would it be acceptable to provide excerpts of courses that are accessible through our own content delivery system for the purpose of the sample evaluation?
    - i. The State Bar would consider using the vendor's LMS testing environment to access and test samples.
  - b. Please clarify what is meant by "demonstrate a diversity of characters that is consistent with the diversity of the State of California".
    - i. California is very diverse state, our education should reflect the rich diversity of cultures, races, ethnicity, socioeconomics, and geography.
  - c. Will our staff need to travel to the State Bar of California office? If so, which office?
    - i. There is no in-person meeting requirement, meetings will be held virtually.
  - d. What is the percentage of on-site work required?
    - i. There is no in-person meeting requirement, meetings will be held virtually.
- 7. Questions regarding specific training modules:
  - a. 10-hour New Attorney Training Program updates:
    - i. What is the list of course titles included in the 10-hour New Attorney Training Program?

1. The list of course titles include:
    - Attorney Communication Duties
  2. Attorney-Client Relationship 101
  3. Basic Law Practice Management Skills
  4. Conflict Resolution, Interpersonal Skills, and Technology
  5. Duty of Confidentiality and Conflicts of Interest
  6. Lawyer as an Officer of the Court - Civility and Pro Bono Legal Services
  7. Lawyer Well-being: The Bedrock of Competence
  8. Recognition and Elimination of Bias
  9. The Lawyer as a Fiduciary of Funds and Property of Clients and Others
- ii. What is the seat time per course for each of the courses?
1. The seat time for each course is generally 60-90 minutes, with the exception of one course that is 30 minutes.
    - Attorney Communication Duties (60 min)
    - Attorney-Client Relationship 101 (75 min)
    - Basic Law Practice Management Skills (60 min)
    - Conflict Resolution, Interpersonal Skills, and Technology (60 min)
    - Duty of Confidentiality and Conflicts of Interest (75 min)
    - Lawyer as an Officer of the Court - Civility and Pro Bono Legal Services (60 min)
    - Lawyer Well-being: The Bedrock of Competence (90 min)
    - Recognition and Elimination of Bias (90 min)
    - The Lawyer as a Fiduciary of Funds and Property of Clients and Others (30 min)
- iii. What is the expected sequence for delivery of the updated courses?
1. This will be determined at a later time.
- iv. What is the estimated percentage of content that needs to be modified for the updates, per course?
1. This will be determined on a course-by-course basis, but generally we expect that it may around 25-50 percent.
- v. On a scale of 1-3, what is the expected nature of the updates required for the current courses that must be modified? (1 = minor edits throughout, 2 = minor edits and less than 25 percent new content, 3 = more than 50 percent new content and/or, major restructuring of topics)
1. 2
- vi. What authoring tool(s) were used to create the existing courses?
1. We believe that the authoring tool used to create the existing courses was Storyline 360.

- vii. Do you expect us to be changing the look and functionality of the course template (layout, graphics, navigation, etc.)?
  - 1. To a certain extent, yes. When updating the substantive content, we hope to explore new graphics and other teaching methods for clarification in modules that may have been unclear to the learner, as well as other new ideas and teaching methods to keep the curriculum fresh and engaging.
- b. Rules of Professional Conduct course updates:
  - i. What is the seat time for this course?
    - 1. The seat time for this course is generally 120 minutes.
  - ii. What is the estimated percentage of content that needs to be modified for the updates to this course?
    - 1. Please see scale question below.
  - iii. What authoring tool(s) were used to create the existing course?
    - 1. We believe that the authoring tool used to create the existing courses was Storyline 360.
  - iv. On a scale of 1-3, what is the expected nature of the updates required for the current course that must be modified? (1 = minor edits throughout, 2 = minor edits and less than 25 percent new content, 3 = more than 50 percent new content and/or, major restructuring of topics)
    - 1. 3
  - v. Do you expect us to be changing the course template (layout, graphics, navigation, etc.)?
    - 1. Please see above.
- c. Probation course updates:
  - i. The probation course will not be included in the updates required by the contract. Please note the courses listed in Attachment A to the RFP, the topics of the courses listed represent a sample of the type of courses we are interested in exploring. The topics are not finalized and are subject to State Bar resources.
- d. New Civility E-Learning course:
  - i. What is the expected seat time for this new course?
    - 1. The seat time for each course is generally 60 minutes.
  - ii. Does this course replace an existing instructor-led class or virtual training?
    - 1. No, this course will be a new course offering.
  - iii. What source materials are available as input to be shared with us to support the course design/development process?

1. Source material will include outlines, lesson plans, and subject matter expertise as well as the rules and best practices surrounding civility and is currently in development.
- iv. What percentage of the anticipated content is not documented and must be gathered through interviews with subject matter experts?
  1. The content has not yet been determined, but interviews with subject matter experts would likely be less than 20 percent of the anticipated content.
- v. Is the expectation to use the same course template as the existing courses for a consistent look and feel, or create a new course template?
  1. Ideally, the State Bar courses will look consistent, however the State Bar is open to a new course template that has a similar look or feel consistent with our prior courses.
- e. New Legal Technology course:
  - i. The RFP indicates this course may be needed if the State Bar Rules are changed. For the purpose of this response, should we assume that this new course will be required (resulting in two new eLearning courses)? Or, should we only include one new eLearning course in the scope, with the decision on which topic (Civility or Legal Technology) to be made by the State Bar?
    1. The final decision has not yet been made. Please note the courses listed in Attachment A to the RFP, the topics of the courses listed represent a sample of the type of courses we are interested in exploring. The topics are not finalized and are subject to State Bar resources.
  - ii. What source materials are available as input to be shared with us to support the course design/development process?
    1. Source material will include outlines, lesson plans, and subject matter expertise as well as the rules and best practices surrounding civility and is currently in development.
  - iii. What percentage of the anticipated content is not documented and must be gathered through interviews with subject matter experts?
    1. The content has not yet been determined, but interviews with subject matter experts would likely be less than 20 percent of the anticipated content.
  - iv. What tasks would be expected to provide assistance running reports and analyze data collected on the courses that require updates? Is this work expected to utilize the State Bar's LMS or some other tool? Are there any deliverables expected for the vendor to produce as a result of this work?
    1. The State Bar has an existing LMS with reporting functionality. You would not be responsible for delivering reports as that is a function of the LMS. However, if the LMS allows for certain types of reporting such

as being able to track the amount of time spent on a module and identifying which questions are commonly answered correctly and incorrectly in the knowledge checks and self-assessments, we expect for the course to allow for that type of reporting/tracking to be possible.