Attachment A: Online CLE Questionnaire

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| **Instructions**: Vendor should provide inline responses to each section below and submit in native MSWord format with their bid packages. Please note your compliance in **BOLD** and explain only as necessary on the next line in blue text. Example:  Response: COMPLY, OPTIONAL COMPLY, PARTIAL COMPLY, or DO NOT COMPLY  Response text – You may describe your compliance here. |

please discuss the following

PRODUCTION

**Services**

* + - 1. Do you have a dedicated production staff?

Response:

* + - 1. What production services do they perform?

Response:

* + - 1. How do you charge for production services?

Response:

* + - 1. Can you digitize existing programs captured on traditional media (e.g., video tapes)?

Response:

* + - 1. Do you provide video editing services?

Response:

* + - 1. Can you produce industry-standard or proprietary file formats for online programs?

Response:

* + - 1. Do your production processes and delivery capabilities support mobile devices?

Response:

* + - 1. If yes, what platforms do you support?

Response:

* + - 1. Do you provide speaker and moderator preparation sessions?

Response:

* + - 1. Do you have audio-visual crews that can support the capture and broadcast of our events?

Response:

* + - 1. Do you have tools that we can use to capture and broadcast our own events for use on your system?

Response:

AUDIOCASTS

* + - 1. Can you stream the audio portion of a live presentation to a participant’s PC in real-time?

Response:

* + - 1. Can you track participation time for each participant?

Response:

* + - 1. Can your solution provide detailed, real-time attendance reports?

Response:

* + - 1. Does your system allow users to exit a program and resume where they left off when they return?

Response:

* + - 1. Can you stream participation codes (letters, numbers, or words) during an event as a means of verifying participant attention to course content?

Response:

* + - 1. Can your solution provide promotional, technical, or emergency alerts during the course of the program?

Response:

* + - 1. Does your solution allow custom branding so that our online identity is preserved and reinforced during the course of the program?

Response:

* + - 1. What do you charge to produce an audiocast?

Response:

* + - 1. Do you provide end-user technical support for participants in your audiocasts?

Response:

WEBINARS

* + - 1. Does your solution support webinars?

Response:

* + - 1. Can you track participation time for each participant?

Response:

* + - 1. Can your solution provide detailed, real-time attendance reports complete with time-in, time-out, and total participation time?

Response:

* + - 1. Does your system allow users to exit a program and resume where they left off when they return?

Response:

* + - 1. Can you stream participation codes (letters, numbers, or words) during an event as a means of verifying participant attention to course content?

Response:

* + - 1. Does your webinar format provide both document- and desktop- sharing modes?

Response:

* + - 1. Does the presenter need to install any additional software in order to manage his presentations online?

Response:

* + - 1. Does your webinar solution preserve PowerPoint slide animations?

Response:

* + - 1. Does your solution provide options for Q&A, polling, and chat?

Response:

* + - 1. Does your solution allow the presenter to see a list of the attendees?

Response:

* + - 1. Can you deliver the audio portion of the call to the participants’ PCs and/or telephones?

Response:

* + - 1. What do you charge to produce a webinar?

Response:

* + - 1. Do you provide end-user technical support for participants in your telephone seminars?

Response:

WEBCASTS

* + - 1. Do you provide webcasts?

Response:

* + - 1. Do you provide technicians to perform the actual video capture?

Response:

* + - 1. Are your technicians employees of your company or do you use third-party contractors?

Response:

* + - 1. Do we have to use your technicians, or can we perform the video capture function with our own staff?

Response:

* + - 1. Have you developed your own webcasting solution or do you use third party solutions?

Response:

* + - 1. Does your webcasting solution make accommodations for the quality of Internet connections at the presentation venue?

Response:

* + - 1. Does your webcasting solution provide a way for remote participants to interact with the moderator or presenter?

Response:

* + - 1. Can your solution provide promotional, technical, or emergency alerts during the course of the program?

Response:

* + - 1. Does your solution allow custom branding, so that our online identity is preserved and reinforced during the course of the program?

Response:

* + - 1. Can you track participation time for each participant?

Response:

* + - 1. Can your solution provide detailed, real-time attendance reports complete with time-in, time-out, and total participation time?

Response:

* + - 1. Does your system allow users to exit a program and resume where they left off when they return?

Response:

* + - 1. Can you stream participation codes (letters, numbers, or words) during an event as a means of verifying a participant attention to course content?

Response:

* + - 1. What do you charge to produce a webcast?

Response:

* + - 1. Do you provide end-user technical support for participants in your webcasts?

Response:

ON-DEMAND PROGRAMS

* + - 1. Can you convert live events into on-demand programs for purchase and viewing after the original event?

Response:

* + - 1. What is your standard turnaround time on the conversion of a live event into an on-demand program?

Response:

* + - 1. Can you track participation time for each participant?

Response:

* + - 1. Does your system allow users to exit a program and resume where they left off when they return?

Response:

* + - 1. Can you stream participation codes (letters, numbers, or words) during an event as a means of verifying participant attention to course content?

Response:

* + - 1. Can you convert existing traditional media (audio and video tapes) into on-demand programs?

Response:

* + - 1. Do you charge for video editing?

Response:

* + - 1. Do you charge for synchronizing slide content with audio and/or video programs?

Response:

* + - 1. Can you stream on-demand programs directly to the participants’ PCs?

Response:

* + - 1. Can on-demand programs be downloaded to participants’ PCs?

Response:

CATALOG

* + 1. Do you have a method for cataloging course content online?

Response:

* + 1. Can that catalog be integrated into our website to preserve our online identity and a consistent user experience?

Response:

* + 1. Does your catalog support mobile devices for browsing and purchasing content?

Response:

* + 1. Does the catalog provide multiple methods for browsing content (e.g., by category, by media type, etc.)?

Response:

* + 1. Does the catalog provide search functionality?

Response:

* + 1. If yes, does the search technology support a variety of CE-specific search criteria? (e.g., keyword, faculty, credits, course name, etc.)

Response:

* + 1. Does the catalog provide contemporary filtering capabilities to quickly narrow searches?

Response:

* + 1. Does your catalog provide dynamic elements (e.g., advertising space, featured items, top five items, etc.) or only static listings?

Response:

* + 1. Do you provide content entry and management services?

Response:

* + 1. Can we manage our own content entry and management?

Response:

* + 1. Do you provide training if we choose to be self-sufficient?

Response:

* + 1. Can templates be created to accelerate course entry?

Response:

* + 1. Can course entries be cloned for a variety of delivery types? (e.g., in-person seminars, webcasts, on-demand programs, etc.)

Response:

* + 1. Can the initial migration of data from our current systems be done in a programmatic fashion or will it require manual data entry?

Response:

* + 1. Does your catalog provide a means of capturing and displaying user feedback?

Response:

* + 1. Do catalog entries automatically schedule the resources (i.e., Internet infrastructure, audio conferencing bridges, etc.) necessary to conduct online programs?

Response:

* + 1. If yes, does a change to a catalog entry automatically reschedule those resources?

Response:

* + 1. Does your catalog provide a preview capability for on-demand programs?

Response:

* + 1. Can your catalog support multiple entry types in addition to online programs (e.g., in-person events, shippable items, and electronic documents, etc.)?

Response:

E-COMMERCE

* + 1. Do you have a shopping cart integrated into your catalog?

Response:

* + 1. Does the shopping cart support subscription pricing?

Response:

* + 1. Does the shopping cart provide the ability to devise advanced bundling, discounting, and pricing schemas (e.g., subscription pricing, buy X get Y free, etc.)?

Response:

* + 1. Can discounts and pricing schemes be applied at the global level? Program level? Media level?

Response:

* + 1. Does your shopping cart provide online transaction processing capabilities?

Response:

* + 1. Does the transaction clear into your merchant banking accounts or ours?

Response:

* + 1. If transactions clear into your merchant banking accounts, what are your transaction processing fees?

Response:

* + 1. Does your organization provide methods and support for offline transaction processing (e.g., phone-in, fax-in, mail-in orders)?

Response:

* + 1. Can a delegate purchase courses on behalf of others?

Response:

* + 1. Does your shopping cart retain shoppers’ information or must the information be re-entered if they modify their selections or continue shopping?

Response:

* + 1. Does your system support gift cards, coupons, and other promotional payment options?

Response:

* + 1. Does your system warn about duplicate registrations?

Response:

* + 1. Does your system provide shipping charge calculations?

Response:

* + 1. Does your system create invoices for customers who choose to complete their transactions offline (i.e., mail-, phone-, or fax- in)?

Response:

* + 1. Does your system create a personal account automatically upon successful completion of the shopper’s first purchase or registration?

Response:

* + 1. Does your system provide immediate program access?

Response:

* + 1. Is your system Payment Card Industry-Data Security Standards (PCI-DSS) compliant?

Response:

REGISTRATION

* + 1. Does your system provide automatic registration upon completion of an online transaction?

Response:

* + 1. Can you specify mandatory information (e.g., member id number) for the registration process?

Response:

* + 1. Will your system provide registration for in-person events?

Response:

* + 1. Can your system support registration up to the event start time?

Response:

* + 1. If not, how long before the event must registration be closed?

Response:

* + 1. Can a delegate register for courses on behalf of others?

Response:

* + 1. Does your system support group registrations?

Response:

* + 1. Does your system provide real-time access to registrant lists?

Response:

* + 1. Can the registration process include marketing and/or qualification questions?

Response:

* + 1. Does your organization provide methods and support for offline registration processing (e.g., phone-in, fax-in, mail-in orders)?

Response:

* + 1. What are your registration processing fees?

Response:

Notification

* + 1. Does your system provide automatic confirmation of a successful transaction, complete with the transaction details?

Response:

* + 1. Does your system provide automatic confirmation of a successful registration, complete with event access details (e.g., dial-in number, URL, password, PIN, etc.)?

Response:

* + 1. Does your system automatically notify registrants if there is a change in event schedule or access details?

Response:

* + 1. Does your system provide automatic event reminders?

Response:

* + 1. Does your system support opt-in categories for automatic notifications?

Response:

* + 1. Does your system allow users to define communications preferences?

Response:

* + 1. If yes, does your system automatically notify users when new content is published in categories into which they have opted in?

Response:

* + 1. Does your system provide templates for marketing campaigns?

Response:

* + 1. Can you segment the participant database for targeted email campaigns?

Response:

Delivery

* + 1. Is your system integrated with the telecommunications and Internet infrastructure required to run online events?

Response:

* + 1. Does your system require manual scheduling of the telecommunications and Internet infrastructure required to run online events?

Response:

* + 1. Does your system require manual data entry to enter registrant information into the systems that will manage the events?

Response:

* + 1. Does your system provide detailed reporting for program entry and exit times?

Response:

* + 1. Does your system have a customizable viewing application?

Response:

* + 1. If yes:
       1. Does that application provide interaction for the remote participant with the live venue?

Response:

* + - 1. Does that application track entry, exit, and total participation times?

Response:

* + - 1. Does that application provide automated polling?

Response:

* + - 1. Can we specify random strings of letters, numbers, or words that need to be repeated back to verify attention to the program?

Response:

* + - 1. Does that application support mobile devices?

Response:

* + - 1. Can users highlight and bookmark areas of a program with personalized subject lines and notes?

Response:

DISTRIBUTION

* + 1. Does your system provide opportunities to market programs beyond our immediate audience?

Response:

* + 1. If yes, can we control which content is shared with other organizations?

Response:

* + 1. Does your system provide access to content from other professional organizations that can be used to supplement our own material?

Response:

* + 1. If yes, can we control which content we share from other organizations?

Response:

* + 1. Does your system account for our content when it is sold through another professional association?

Response:

* + 1. Can your system provide real-time reporting of revenue generated by the sale of our content through other associations?

Response:

* + 1. Does your system provide revenue when content from other professional associations is sold through our catalog?

Response:

EVALUATION

* + 1. Does your system provide post-event testing?

Response:

* + 1. If yes, can the test be made optional or mandatory on a course-by-course basis?

Response:

* + 1. Does your system support a variety of question types (e.g., free-form, multiple-choice, true-false, etc.)?

Response:

* + 1. Is the number of questions fixed?

Response:

* + 1. Can we determine the percentage correct that represents a passing score?

Response:

* + 1. Does your system allow supplemental questions?

Response:

* + 1. Can questions be presented in a random order?

Response:

* + 1. Are participants presented with their results in real-time upon submitting their answers?

Response:

* + 1. Does your system support course evaluations?

Response:

* + 1. If yes, can they be made optional or mandatory on a course-by-course basis?

Response:

CERTIFICATION

* + 1. Does your system track entry, exit, and total complete time for each participant?

Response:

* + 1. Does your system allow users to exit a program and resume where they left off when they return?

Response:

* + 1. Can your system produce real-time participation reports with time-tracking information?

Response:

* + 1. Does your system allow random participation codes (e.g., letters, numbers, or words) to be embedded within a program at random intervals?

Response:

* + 1. What other methods does your system support for verifying attendance at (and attention to) online programs?

Response:

* + 1. Does your system have methods for verifying that a participant is actually viewing a program that they have started?

Response:

* + 1. Does your system give participants access to certificates of completion?

Response:

* + 1. What methods does your system support to ensure that certificates are only provided to participants who have met the course requirements for satisfactory completion?

Response:

* + 1. Can we determine which methods (or gates) we apply before our participants receive their certificate of completion?

Response:

* + 1. Can the certificate be customized to reflect the requirements of multiple different jurisdictions?

Response:

REPORTING

* + 1. Does your system provide a reporting mechanism?

Response:

* + 1. Are the reports your system provides fixed or can they be customized?

Response:

* + 1. Can the reports be customized by us, or does customization require your involvement?

Response:

* + 1. Are there separate charges for report customization?

Response:

* + 1. Can the data from your system be exported in standard forms (i.e., Excel, .csv file)?

Response:

* + 1. Can the data from your system be shared directly with other systems?

Response:

* + 1. Describe the nature and type of reports that can be generated by your system?

Response:

PERSONAL ACCOUNT MANAGEMENT

* + 1. Does your system provide personal accounts for users?

Response:

* + 1. If yes, what aspects of their CME can users manage through their accounts?

Response:

* + 1. Does your system allow users to update their contact information?

Response:

* + 1. Does your system allow users to track their CME credit?

Response:

* + 1. Can users access and stream their on-demand programs from your system?

Response:

* + 1. Does your system allow users to modify their communication preferences?

Response:

* + 1. Can users opt into and out of categories that interest them?

Response:

* + 1. Does your system provide access to purchase receipts for users?

Response:

* + 1. If yes, can users access those receipts at a later date?

Response:

* + 1. Is there a central access point in your system for users to access supplementary course materials?

Response:

* + 1. How do users access post-event tests or evaluations?

Response:

support

CLIENTS

* + 1. Does your company offer dedicated, named client support?

Response:

* + 1. When is client support available?

Response:

* + 1. How do you handle emergency and after-hours support?

Response:

* + 1. Do you provide performance guarantees or a formal Service Level Agreement (SLA)?

Response:

* + 1. Does your company provide support for system administration?

Response:

* + 1. Does your company provide support for program administration?

Response:

* + 1. Will your company manage content entry for courses and other catalog entries?

END-USERS

* + 1. Does your company provide technical support for end-users?

Response:

* + 1. If yes, please describe the nature of your end-user support services.

Response:

* + 1. Explain the availability of your end-user support services.

Response:

* + 1. Is your company’s call center managed and monitored for key metrics (e.g., hold times, abandon rates, call volume, etc.)?

Response:

* + 1. Where is your call center located?

Response:

* + 1. How do you manage periods of peak call volume?

Response:

* + 1. Does your company provide offline registration services (mail-in, fax-in, and phone-in)?

Response:

* + 1. Does your company provide offline transaction processing services (i.e., mail-in, fax-in, and phone-in)?

Response:

* + 1. Does your company process refunds for end-users?

Response:

* + 1. Does your end-user support operate under the direction of the customer, or according to the company’s policies?

Response:

operating environment

SOLUTION ARCHITECTURE

* + 1. Is your software application hosted or deployed within the enterprise?

Response:

* + 1. If your solution is hosted, what is your data center strategy?

Response:

* + 1. Do you have a distributed Content Delivery Network (CDN) for distributing online programs?

Response:

* + 1. What is the underlying technology for your application?

Response:

* + 1. What browsers does your solution support?

Response:

* + 1. What operating systems does your solution support?

Response:

* + 1. Does your system have an Application Programming Interface (API)?

Response:

* + 1. What system administration functions are left to the client?

Response:

SCALABILITY

* + 1. Describe the size range of the clients you currently support.

Response:

* + 1. What is the largest single event hosted on your system?

Response:

* + 1. How many simultaneous events do you host across all clients?

Response:

* + 1. How do you achieve scalability with your application?

Response:

* + 1. Do you have a formal Service Level Agreement?

Response:

* + 1. Do you deliver programs through a distributed Content Delivery Network (CDN)?

Response:

* + 1. If yes, how many Points-of-Presence (PoPs) do you have? Please indicate how many are domestic and how many are international.

Response:

SECURITY

* + 1. Over how many data centers is your solution deployed?

Response:

* + 1. Is your application housed in company-owned or third-party data centers?

Response:

* + 1. Are the facilities named-access-only?

Response:

* + 1. If yes, which employees are granted access to the data centers?

Response:

* + 1. Do you have network security experts on staff?

Response:

* + 1. Do you perform third-party security audits of your application?

Response:

* + 1. Is your application Payment Card Industry-Data Security Standards (PCI-DSS) compliant?

Response:

* + 1. If yes, has your compliance been verified by a third-party?

Response:

* + 1. Does your system provide roles-based access and privileges?

Response:

* + 1. What is the authentication schema for end-users?

Response:

* + 1. What is the authentication schema for administrators?

Response:

PERFORMANCE AND USABILITY

* + 1. Do you provide a performance level guarantee?

Response:

* + 1. Do you have a formal Service Level Agreement (SLA)?

Response:

* + 1. If yes, what is your stated up-time?

Response:

* + 1. What is your transaction response time?

Response:

* + 1. Describe the approach your company has taken to ensure usability.

Response:

MOBILE AND OFFLINE LEARNING

* + 1. Can end-users locate, select, purchase, and manage programs through a mobile device?

Response:

* + 1. Can end-users view programs through a mobile device?

Response:

* + 1. Can your system track participants who access programs through mobile devices?

Response:

* + 1. Can your system support offline learning?

Response:

* + 1. If yes, explain.

Response:

* + 1. Can your system validate participation for offline viewers?

Response:

* + 1. If yes, explain.

Response:

USER ADMINISTRATION

* + 1. Can user data from other systems be imported into your system?

Response:

* + 1. Does your system provide an interface for searching customer records?

Response:

* + 1. What end-user information is available to program administrators?

Response:

integration

INFORMATION SHARING WITH THIRD-PARTY SYSTEMS

* + 1. Does your system support information-sharing with third-party applications?

Response:

* + 1. If yes, explain the variety of methods you support.

Response:

SOCIAL MEDIA INTEGRATION AND ANALYTICS

* + 1. Does your system integrate with common social media applications?

Response:

* + 1. If yes, which ones and how?

Response:

* + 1. Does your system support and end-user rating system?

Response:

* + 1. If yes, can those ratings be exposed to potential purchasers as a mechanism for evaluating program quality?

Response:

* + 1. Can end-users provide comments on programs listed in your system?

Response:

* + 1. If yes, can those comments be exposed to potential purchasers?

Response:

* + 1. Does your system provide analysis on shopping patterns (e.g., page visits, click paths, abandon rates, etc.)?

Response:

* + 1. Do you integrate with third-party analytics packages like Google Analytics?

Response:

SINGLE SIGN-ON

* + 1. Can users who sign into our existing member management system be automatically authenticated in your system?

Response: