



## Legislation Details (With Board Report)

<b>File #:</b>	17-1249	<b>Name:</b>	2017.12.11_LMS Replacement_ (CIC )
<b>Type:</b>	General Agenda Item	<b>Status:</b>	Agenda Ready
<b>File created:</b>	12/6/2017	<b>In control:</b>	Capital Improvement Committee
<b>On agenda:</b>	12/11/2017	<b>Final action:</b>	
<b>Title:</b>	<p>a. Support approval, as a priority Capital Improvement Project (CIP) in FY2019, to fund the replacement of the County's current Learning Management System (LMS) solution. The County's new solution will:</p> <ol style="list-style-type: none"><li>1. Automate and facilitate the delivery, management, tracking and reporting of online and instructor-led trainings available countywide for mandated trainings, certified education, and optional or suggested development; and</li><li>2. Provide features for electronic performance evaluations and knowledge management and succession planning.</li></ol> <p>b. Support approval for the issuance of a Request for Proposal (RFP) and ultimate selection of a qualified LMS Contractor for a term period of 5-years.</p>		

### Sponsors:

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### Code sections:

**Attachments:** 1. Staff Report, 2. Attachment A LMS Requirements

Date	Ver.	Action By	Action	Result
12/11/2017	1	Capital Improvement Committee		

- a. Support approval, as a priority Capital Improvement Project (CIP) in FY2019, to fund the replacement of the County's current Learning Management System (LMS) solution. The County's new solution will:
1. Automate and facilitate the delivery, management, tracking and reporting of online and instructor-led trainings available countywide for mandated trainings, certified education, and optional or suggested development; and
  2. Provide features for electronic performance evaluations and knowledge management and succession planning.
- b. Support approval for the issuance of a Request for Proposal (RFP) and ultimate selection of a qualified LMS Contractor for a term period of 5-years.

### RECOMMENDATION:

It is recommended that the Capital Improvement Committee:

- a. Support approval of funding as a priority CIP in FY2019 to replace the County's current LMS solution and implement the additional required features.
- b. Support approval of issuance of RFP based on a thorough, documented Statement of Work and selection of qualified vendor for a term period of 5-years.

### SUMMARY/DISCUSSION

The County of Monterey is facing the critical need to replace its LMS. The County's current LMS is no longer supported by the vendor, and as a result, the Human Resources Department has been assessing current applications and pain points and collecting countywide functional requirements.

The current LMS was originally managed by the Auditor-Controller Department's Enterprise Resource

Planning (ERP) division, and funding was administered through Full-Time Equivalent charges by department. With ERP's HRM upgrade project soon completed, the Human Resources Department has been informed it needs to seek funding for an automated software product that integrates with the new CGI Advantage production environment.

The County's LMS investments need to provide learning programs designed to meet regulatory requirements for management, supervisory and staff development needs and to meet Board of Supervisors' strategic initiatives. Currently, the LMS is experiencing employee profile errors. The errors prevent determination of an employee's department, supervisor, training completion status, and transcripts. Because of the lack of vendor support, these errors cannot be corrected. Registering for training has become increasingly difficult because some employees do not have a menu option to enable class enrollment. Departments that provide countywide mandatory training are unable to upload federal or state mandated online training; rendering the cost of Learning and Development Network Coordinators manually scheduling and tracking education and certifications in Excel at the rate of \$45 per hour; other rendered cost expenditures occur when departments purchase additional software and enter into support contracts with vendors (for one example, Natividad's contract with HealthStream) to host and develop training curriculum. Without these manual workarounds and decentralized solutions, the County would be at risk of not being able to adequately confirm regulatory compliance -- but at what cost and level of confidence.

The new LMS will ensure compliance with mandatory training and interface with the new CGI Advantage production environment. It would also allow the Human Resources Department to centralize and eliminate, or minimize, a paper based process, and to better manage employee engagement and critical skill development. In addition, the new LMS will provide the integration of knowledge, skills and abilities and competencies, goals, metrics, and action plans with built-in electronic performance appraisal features.

Based on the Board of Supervisors' strategic initiatives, pain points with, and lack of support for, the current LMS and performance management processes, and the imperative to track and facilitate regulatory compliance, the Human Resources Department, in collaboration with other departments, recommends the funding and implementation of the current LMS platform's replacement.

#### OTHER AGENCY INVOLVEMENT

The Auditor-Controller Office assisted in determining the LMS replacement need. The County Administrative Office-Budget and Analysis Division advised on the requirements to seek approval and funding. LMS Department coordinators were consulted for foundational County employee lifecycle recommendations for the development of the RFP requirements. The County's ITD Director has partnered thus far and will continue to collaborate with the Human Resources Department to ensure the best and most modern, and cost-effective solution is realized.

#### FINANCING

The estimated cost to complete the software replacement and agreement for use is yet to be determined. By way of example though, the typical cost for this software platform over a five-year period is in the \$1 million to \$1.3 million range. The Human Resources department has identified four possible financing options:

- Option 1: Reallocation of Capital Improvement Funds
- Option 2: General Fund Contributions
- Option 3: FTE Contribution Allocation Method
- Option 4: Combination of using Capital Improvement Funds for implementation of the LMS and implementation of the Department FTE Contribution Allocation Method for funding annual subscription fees.

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Attachment: Attachment A - Learning Management System Requirements