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REQUEST FOR PROPOSALS (RFP) FOR:

Invest Appalachia Framer Training Learning Management System (LMS) Implementation

Anticipated Contract Period: October 13, 2026 - April 30, 2027

Not-to-Exceed Contract Amount: $60,000

RELEASE DATE: September 1, 2026

PROPOSAL DUE DATE: September 22, 2026 at 5:00 p.m. Eastern Time

Responses received after the deadline will not be considered.

Request for Proposals - Framer Training LMS Implementation

RFP Open Date	Deadline for Questions	Proposal Due Date	Vendor Interviews	Anticipated Selection	Anticipated Contract Period
September 1, 2026	September 15, 2026	September 22, 2026, 5:00pm ET	September 24 and 28, 2026	October 1, 2026	October 13, 2026 - April 30, 2027

I. Overview of Request for Proposals

Invest Appalachia (IA) seeks an experienced learning management system (LMS) implementation vendor to recommend an LMS platform and configure a user-friendly online learning environment for the Framer Training program. The selected vendor will work with IA to translate an existing nine-module curriculum and supporting program materials into an organized, accessible LMS experience for non-academic adult learners and the staff, facilitators, speakers, and affiliates who support them.

IA has not preselected an LMS platform. Applicants should recommend the platform they believe best meets the requirements in this RFP and Attachment A: Functional Requirements. Applicants may present more than one viable option when appropriate, but should clearly identify their preferred recommendation and explain why it is the best fit.

IA will provide the core curriculum, presentations, assignments, facilitator materials, and other program content. The selected vendor is not being hired to create the curriculum from scratch. The vendor will be expected to apply instructional-design expertise to organize, package, configure, and present existing content effectively for online delivery, with particular attention to usability and engagement for non-academic adult learners.

The selected vendor will be responsible for LMS recommendation and implementation, system architecture and configuration, user roles and permissions, integrations and automations, content packaging and upload, testing, documentation, training, launch readiness, final revisions, and three months of post-implementation warranty and technical support.

Anticipated budget: Not to exceed $60,000, inclusive of vendor implementation services, subject matter expert costs, Year 1 LMS/software licensing, required third-party tools or integrations, and the required three-month post-implementation support period.

II. Background

About Invest Appalachia

Invest Appalachia is a regional blended capital platform designed to accelerate and expand community investment across Central Appalachia. IA works across Appalachian communities to support locally rooted economic development and investment strategies. More information is available at www.investappalachia.org.

About Community Investment Framers Training

The Community Investment Framers Training helps turn strong community ideas into projects that are better prepared to attract investment and move toward implementation. The program gives community and economic development leaders practical tools, financial knowledge, connections, and hands-on support to help them “frame up” promising projects for investment.

The first Appalachia Investment Framer Action Cohort launched in 2021 with 14 participants from across Central Appalachia. Participants worked on projects related to small businesses, social enterprises, community facilities, and downtown real estate development while learning from regional and national experts and building relationships with funders and investors. The goal was simple but important: strengthen the pipeline of people across Appalachia who have the skills, tools, and connections needed to move good local ideas forward.

Since then, Framer Training has continued to grow and evolve into a structured adult-learning program built around a synchronous nine-module curriculum, virtual instructor-led training (VILT) with guest speaker presentations, assignments, resources, and project-focused support. The program now serves multiple user groups, including Licensed Affiliates, Certified Facilitators, Participants, Speakers, and System Administrators.

The training is designed around a challenge that many Appalachian communities know well. While great ideas often originate locally, moving them from concept to investment-ready projects can require specialized financial knowledge, stronger project planning, and access to capital that local leaders may not have. Framer Training helps close that gap by building local capacity so more promising projects can move forward and create lasting community and economic impact.

As Framer Training expands to serve more participants, cohorts, facilitators, speakers, and partner organizations across the region, Invest Appalachia needs a stronger system to manage and deliver the program. The new Learning Management System will create a shared home for curriculum, assignments, resources, live-session coordination, communications, speaker preparation, progress tracking, and program administration. The goal is not simply to put the curriculum online. It is to create an easy-to-use (and manage) system that helps Framer Training scale and maintain the practical, personal, and community-centered experience that has made the program successful while structuring learning assets in a way that could allow for future self-directed asynchronous learning.

The initial LMS beta Cohort will consist of Harlan County, Kentucky participants, from the towns of Harlan, Cumberland, Lynch, and Evarts, while also allowing participation from other parts of the broader region as appropriate. A certified Facilitator and local program manager will utilize the LMS core curriculum and may need to provide local content to support community and economic development projects, including downtown revitalization and other place-based development efforts.

During the LMS design and implementation phase, the selected vendor will work directly with Invest Appalachia. Detailed public-facing user and functionality requirements are provided in **Attachment A: Functional Requirements**.

III. Scope of Work

The selected vendor will be expected to perform the following core services:

- Review Attachment A and validate detailed workflows, permissions, integrations, and configuration needs with IA at project kickoff.
- Recommend an LMS platform, or a small number of viable options, based on the required functionality, user experience, accessibility, security, data portability, administrative needs, recurring cost, and long-term usability and scalability.
- Configure the selected LMS architecture, including user roles, permissions, affiliate and cohort structures, navigation, branding, dashboards, curriculum organization, reporting boundaries, and administrative controls.
- Package and upload IA-provided curriculum and materials for effective online delivery to non-academic adult learners, including the nine-module curriculum, facilitator resources, participant assignments, speaker materials, templates, recordings, and other approved assets.
- Configure required communications, reminders, assignments, workflow automations, application or enrollment functions, assessments, completion rules, reporting, and other features identified in Attachment A.
- Configure Zoom or a comparable approved live-training integration to support live sessions, speaker presentations, breakout rooms, attendance, recordings, and related workflows.
- Configure and test user experiences for Licensed Affiliates, Certified Facilitators, Participants, Speakers, and System Administrators.

- Support accessible and responsive use across common desktop, tablet, and mobile devices, with particular attention to users who may have limited experience with online learning technology and limited reliable internet service.
- Configure appropriate role-based security and privacy protections for user and participant information.
- Provide testing support, troubleshooting, administrator training, documentation, and recommendations needed for IA to maintain the LMS after implementation.
- Complete revisions based on IA review and beta testing and deliver a stable final implementation by January 31, 2027.
- Provide a three-month post-implementation warranty and technical support period through April 30, 2027, including reasonable troubleshooting, defect correction, and support related to the completed scope.

LMS Platform Recommendation

Applicants should identify the recommended LMS platform and explain why it is well suited to Framer Training. The proposal should address the platform's fit for the five user groups, required features, Zoom or live-training integration, automations, reporting, permissions, accessibility, security, data portability, administration, and long-term maintenance. Applicants must identify Year 1 and estimate ongoing licensing, subscription, hosting, add-on, and third-party costs.

Ownership and Data Control

Invest Appalachia will retain ownership and control of the Framer Training curriculum, uploaded assets, user and program data, exports and backups, and project-specific configuration documentation or materials created for IA under this engagement. Applicants must clearly identify any proprietary tools, templates, software components, integrations, or other elements in the proposed solution that will remain owned or controlled by the vendor or another third party. The solution should support practical export of IA content, files, reports, and user data in commonly usable formats.

WHAT SUCCESS LOOKS LIKE

At the end of this project, Invest Appalachia will have a functional, user-friendly LMS that can support multiple Framer Training cohorts and partner organizations; provide clear experiences for Affiliates, Facilitators, Participants, Speakers, and Administrators; reduce manual administrative work; support live and asynchronous learning; and be practical for Invest Appalachia to manage and scale over time.

FRAMER TRAINING LMS

USER ROLES + KEY FUNCTIONS

The LMS will support the delivery, coordination, and growth of Invest Appalachia's Framer Training program by providing a shared system for curriculum, live training, assignments, resources, communications, speaker coordination, progress tracking, and administration.

1. LICENSED AFFILIATES

- Manage permitted cohorts and participant groups
- Communicate with participants
- View participant progress and cohort results
- Customize permitted materials and assessments
- Access authorized reports and program information

KEY FUNCTIONS

- 9-Module Curriculum
- Live Training Sessions
- Assignments and Activities
- Speaker Engagement
- Resource Library
- Automated Communications
- Progress Tracking
- Reporting and Administration

2. CERTIFIED FACILITATORS

- Deliver training and guide cohorts
- Manage participants and speakers
- Coordinate and host live sessions
- Review assignments and track completion
- Send announcements, reminders, and follow-up communications

3. PARTICIPANTS

- Complete onboarding and orientation
- Access the 9 training modules and related resources
- Attend live sessions and view permitted recordings
- Submit assignments and activities
- Track progress and know what to do next

4. SPEAKERS

- Complete speaker onboarding
- Access assigned session details and expectations
- Upload or share presentation materials
- Communicate with facilitators
- Join and participate in live sessions

5. SYSTEM ADMINISTRATORS

- Manage users, roles, and permissions
- Configure curriculum, workflows, and communications
- Manage cohorts, content, and integrations
- Monitor reporting, progress, and system activity
- Test, troubleshoot, and maintain the LMS

ONE COORDINATED SYSTEM

Different user roles. Different responsibilities. One shared system that keeps Framer Training organized, engaging, and effective.

The LMS must support multiple user roles with different responsibilities while providing one coordinated system for training delivery, communication, progress tracking, and program administration.

IV. Required Deliverables and Project Milestones

Applicants should submit a proposal only if they can begin work no later than October 13, 2026, and meet the required milestones below. IA expects an iterative build process with scheduled demonstrations and review points so issues can be identified early and resolved before beta testing.

Milestone	Required Date	Expected Result
Vendor Kickoff Meeting	Oct. 13, 2026	Confirm platform decision, detailed implementation plan, responsibilities, workflows, and immediate build priorities.
Early Build Review	Oct. 28, 2026	Showcase LMS structure, user roles, permissions, and navigation.
Mid-Build Showcase	Nov. 18, 2026	Review required features, Zoom integration, automations, and core workflows.
Pre-Beta Review	Dec. 8, 2026	Complete full user-experience pathway walkthrough and identify remaining issues before beta testing.
Beta Testing Milestone	Dec. 15, 2026	Participant, Guest Speaker, and Facilitator experiences are ready for beta testing.
Final Change Requests	Jan. 15, 2027	IA delivers final prioritized change requests based on testing and review.
Final Revisions Complete	Jan. 31, 2027	Final LMS curriculum, architecture, configuration, and required implementation revisions complete.
Post-Implementation Support	Feb. 1-Apr. 30, 2027	Provide three months of warranty, troubleshooting, defect correction, and reasonable technical support.

V. Contractor Qualifications

Required Qualifications

- Demonstrated hands-on LMS implementation experience, including experience selecting, configuring, and launching at least two LMS platforms.
- Experience organizing or packaging adult-learning material for online delivery, with demonstrated ability to support non-academic adult learners.
- Strong attention to detail and ability to translate user requirements into practical LMS configuration and workflows.
- Demonstrated capacity to begin by October 13, 2026 and meet the required project milestones.
- Ability to provide required contractor documentation and insurance, including a completed W-9, general liability insurance, professional liability/errors and omissions insurance, and cybersecurity insurance.

Preferred Qualifications

- Education, instructional design, adult-learning, or related professional background.
- Relevant LMS, online-learning, accessibility, technical, or instructional-design certifications.
- Experience working with Appalachian, rural, economically distressed, or similar communities.
- Experience implementing accessible, mobile-friendly learning environments for users with varying levels of technical comfort.
- Demonstrated experience with Zoom or comparable live-training integrations, automations, reporting, and role-based permissions.

VI. Proposal Evaluation and Selection Process

IA will use a competitive proposal process. Proposals will first be screened for minimum eligibility. Only proposals that pass the minimum screening will advance to weighted evaluation. The complete scoring methodology is provided in Attachment B: Selection Rubric.

Pass / Fail Screening

- Proposal received by September 22, 2026 at 5:00 p.m. Eastern Time.
- Proposal includes all required components listed in this RFP.
- Total proposed contract amount is within the established budget cap.
- Applicant demonstrates LMS implementation experience with at least two LMS platforms.
- Applicant can begin by October 13, 2026 and meet required milestones.
- Applicant can provide the required insurance and W-9 documentation.

Weighted Evaluation

Evaluation Criterion	Maximum Points
1. LMS Implementation Experience	15
2. Adult Learning & Instructional Design Experience	15
3. Past Performance, References & Work Samples	15
4. Understanding of Project & User Requirements	10
5. Recommended LMS Platform & Technical Approach	10
6. User Experience & Accessibility	10
7. Project Approach, Timeline & Capacity	10
8. Qualifications of Key Personnel & Attention to Detail	5
9. Appalachian / Rural Experience	5
10. Cost & Overall Value	5
TOTAL MAX SCORE	**100**

IA may invite top-ranked applicants to participate in an interview and/or demonstration. Top candidates may be contacted as early as September 23, 2026, and no later than September 28, 2026. **Applicants should keep September 24 and September 28, 2026 available for potential interviews** or demonstrations.

The selected vendor must also be available for the **required project kickoff meeting on October 13, 2026,** and be prepared to begin work no later than that date.

IA will award the contract to the applicant whose proposal is most advantageous to the project based on the published evaluation criteria, demonstrated ability to meet requirements, cost and overall value, and any interview or demonstration conducted. IA is not required to select the lowest-cost proposal.

VII. Budget and Contract Requirements

The anticipated not-to-exceed budget for this scope is $60,000. **Applicants must complete Attachment C: Budget Template.** The total proposed contract amount must include all known costs necessary to complete the required scope through the end of the three-month post-implementation support period.

- Vendor implementation services and professional fees.
- Subject matter expert costs included in the proposed scope.
- Year 1 LMS platform/software licensing, subscriptions, hosting, or required software costs.
- Required third-party tools, integrations, add-ons, or services.
- Three-month post-implementation warranty and technical support.
- Any other costs necessary to complete the proposed scope.

Applicants may recommend their preferred payment structure or schedule. Milestone-based, monthly, or other reasonable payment structures are acceptable, provided the total proposed contract amount remains within the budget cap.

Applicants should separately identify estimated annual licensing, subscription, hosting, third-party, and other recurring costs after Year 1. These future recurring costs are not part of the initial contract amount unless specifically included in the proposal, but IA will consider them when evaluating long-term value.

The **selected contractor will be required to provide a completed W-9 and proof of general liability, professional liability/errors and omissions, and cybersecurity insurance prior to contract execution** or as otherwise directed by IA. Specific coverage limits may be confirmed during contracting.

VIII. Instructions to Submit a Proposal

Applicants may use Attachment D: Optional Proposal Response Template to organize their submission. Use of the template is not required. Applicants may use their own format as long as all required proposal information is included and reviewers can easily locate the information requested under each evaluation criterion.

Proposal Length: Narrative responses to **Criteria 1-10** should total no more than **5 pages combined**.

The following items do **not** count toward the 5-page narrative limit:

- Cover page
- Tables
- Resumes or CVs
- Work samples, screenshots, or links
- References
- Attachment C: Budget Template
- Any optional detailed response to Attachment A: Functional Requirements

Applicants are encouraged to keep all supplemental materials concise and directly relevant to the evaluation criteria.

Required Proposal Content:

Applicants should address the following criteria in the order shown below. These criteria correspond directly with **Attachment B: Selection Rubric**.

1. LMS Implementation Experience

Describe your experience selecting, configuring, implementing, and launching LMS platforms. Include experience with at least two LMS platforms and identify projects comparable in complexity to this project.

2. Adult Learning & Instructional Design Experience

Describe your experience organizing and packaging existing curriculum for effective online delivery,

particularly for non-academic adult learners. Explain how you make online learning practical, engaging, and easy to navigate.

3. Past Performance, References & Work Samples

Provide at least two relevant project examples involving LMS implementation, online learning, or comparable digital training work. For each example, briefly describe the client, platform, scope of work, your role, key features or outcomes, and include or attach a work sample, link, screenshot, or demonstration when available.

Also provide at least two prior client references for comparable work, including name, title, organization, email address, phone number, and a brief description of the work performed.

4. Understanding of Project & User Requirements

Briefly explain your understanding of the Framer Training LMS project, the five user groups (Licensed Affiliates, Certified Facilitators, Participants, Speakers, and System Administrators), and the most important functional needs described in **Attachment A: Functional Requirements**.

Identify any major assumptions, concerns, exceptions, dependencies, or areas where you recommend a different approach.

Applicants may also provide an optional detailed response to Attachment A. This may be a separate line-by-line response or a concise list of requirements that cannot be met as written, recommended adaptations, assumptions, dependencies, third-party tools, or additional costs. This optional response does not count toward the 5-page narrative limit.

5. Approach to Selection of LMS Platform

Outline your past client approach or how you might approach this project in these areas:

1. Matching the LMS platform features (required and preferred) for the client.

2. Describe your technical approach, including roles and permissions, video conferencing software preferences, automations, integrations, reporting, security, accessibility, data portability, and any important third-party tools or dependencies.

3. How did/would you help a client compare the LMS options and clearly identify and select the best LMS for their needs?.

6. User Experience & Accessibility

Describe how you will create an intuitive, accessible, responsive, and mobile-friendly experience for Participants, Facilitators, Affiliates, Speakers, and Administrators, including users with varying levels of comfort with online learning technology.

7. Project Timeline & Capacity

Describe your proposed implementation approach, work plan, project management process, staffing and capacity, and ability to begin work by **October 13, 2026** and meet the required project milestones.

Identify major dependencies on Invest Appalachia and anticipated review, decision, or approval needs that could affect the implementation schedule.

8. Qualifications of Key Personnel & Attention to Detail

Identify the key personnel who will perform the work, their anticipated roles, relevant qualifications, and estimated level of involvement.

Provide resumes or CVs for key personnel.

9. Appalachian / Rural Experience

Describe relevant experience working with Appalachian, rural, economically distressed, or similar communities and explain how that experience informs your approach to this project.

10. Cost & Overall Value

Complete and submit **Attachment C: Budget Template**.

The total proposed contract amount must remain within the stated not-to-exceed budget. Applicants may also briefly explain information that will help Invest Appalachia understand the overall value of the proposed solution, including long-term affordability, recurring costs, efficiencies, or other important cost considerations.

Required Administrative Confirmations

Applicants must confirm that they can provide the following documentation if selected:

- General liability insurance
- Professional liability/errors and omissions insurance
- Cybersecurity insurance
- Completed W-9

These documents do not need to be submitted with the proposal. However, the selected vendor must provide them to Invest Appalachia before the final contract is signed and work begins.

Submission Instructions

Submit proposals by email **no later than September 22, 2026, at 5:00 p.m. Eastern Time** to:

Ruthie Caldwell, Project Manager
Email: ruthie@visiongranted.com
CC: paul@investappalachia.org
Subject line: RFP Proposal Submission - Invest Appalachia Framer Training LMS

Proposals received after the deadline will not be considered.

Questions

Questions regarding this RFP should be submitted in writing by email to **Ruthie Caldwell, Project Manager, at ruthie@visiongranted.com** no later than **September 15, 2026**.

IX. RFP and Selection Schedule

Selection Step	Target Date
RFP released, and outreach begins	September 1, 2026
Deadline for applicant questions	September 15, 2026
Proposals due	September 22, 2026 at 5:00 p.m. ET
Review and score proposals	September 22-27, 2026
Potential interviews/demonstrations	September 24 and/or September 28, 2026
Top candidates notified for interview/demo	As early as September 23 and no later than September 28, 2026
Select vendor and notify applicants	October 1, 2026
Finalize and sign contract	October 9, 2026
Required vendor kickoff/work begins	October 13, 2026

**IA reserves the right to adjust the procurement schedule as needed. Applicants will be notified of material schedule changes that affect the submission or selection process.*

X. Attachments

- Attachment A: Functional Requirements
- Attachment B: Selection Rubric
- Attachment C: Budget Template
- Attachment D: Optional Proposal Response Template

XI. General Conditions

- IA may reject any or all proposals, request clarification or additional information, negotiate scope or contract terms with a selected applicant, or cancel this RFP if doing so is in the best interest of the project.
- Costs incurred in preparing or submitting a proposal are the responsibility of the applicant and will not be reimbursed by IA.
- Submission of a proposal does not create a contract or guarantee an award. A contract will exist only after written execution by authorized parties.
- Applicants should clearly disclose any actual or potential conflicts of interest related to this procurement.
- Any material exceptions to the RFP requirements should be clearly identified in the proposal.