FREQUENTLY ASKED QUESTIONS (FAQ)

Invest Appalachia Framer Training Learning Management System (LMS) Implementation

Updated September 17, 2026

This FAQ supplements the RFP, attachments, and updates posted on the RFP webpage.

RFP webpage: https://investappalachia.org/framer-rfp/

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Tip: Use Ctrl+Click in Microsoft Word (or click normally in most PDF/web viewers) to follow the links.

Eligibility & Submission Requirements

1. Must the prime applicant be a U.S.-registered entity, and is a W-8BEN-E accepted instead of a W-9?

For this procurement, the prime applicant must be a U.S.-registered entity able to provide a completed W-9. A W-8BEN-E will not be accepted in place of the W-9 for the pass/fail eligibility screening.

Non-U.S. entities that cannot meet this requirement are not eligible to submit as the prime contractor.

2. Is the September 1, 2026 RFP the final released version even though the filename includes "draft2"?

Yes. The September 1, 2026 version is the final released RFP. The "draft2" wording remains in the filename but does not mean the document is still a draft. Applicants should also review any addenda or updates posted with the RFP.

3. Where can applicants find the RFP, Attachments A-D, and any updates?

The RFP webpage is: https://investappalachia.org/framer-rfp/

Beneath the RFP, look for "Download RFP Attachments (Templates)" and click the download button for the zipped RFP documents. The ZIP file contains Attachments A-D. Review the same webpage for any posted addenda or updated FAQs.

If you are still unable to access the documents, email ruthie@visiongranted.com to request a copy.

4. What insurance coverage limits should applicants account for when pricing?

Invest Appalachia prefers approximately $1 million in coverage for general liability, professional liability/errors and omissions, and cybersecurity insurance. However, $1 million is not an absolute requirement for every applicant.

A smaller firm carrying lower coverage should explain its current coverage and why that level is appropriate for its operations. For example, a firm with no in-person business activities may explain its limited physical-injury exposure as the reason for carrying lower general liability coverage.

Applicants should also indicate whether they could obtain additional coverage if needed during contracting. Final insurance requirements will be confirmed before contract execution.

5. May comparable LMS experience include work as a consultant, subcontractor, or technical lead rather than as the prime contractor?

Yes. Comparable experience may include hands-on LMS implementation or configuration work performed as a consultant, subcontractor, or technical lead. The proposal should clearly identify the applicant's specific role and responsibilities. Applicants should also provide a reference who can speak to that work, such as the client or the prime contractor's project manager.

6. Can the required experience with at least two LMS platforms be demonstrated collectively by the proposed team?

Yes. Experience may be demonstrated collectively across the proposed key personnel/delivery team, including a named specialist subcontractor. Neither the applicant company itself nor a single individual must have delivered both implementations.

Clearly identify which team member has experience with each platform, their specific hands-on implementation or configuration responsibilities, and how that experience will contribute to this project. For subcontractors, include their qualifications and anticipated level of involvement.

7. Are subcontractors or specialist partners permitted on the delivery team?

Yes. Subcontractors or specialist partners may be included. Their roles, qualifications, anticipated level of involvement, and associated costs should be clearly identified. If a specific individual or firm has not yet been selected, describe the qualifications required for that role and include anticipated costs in the budget. See Question 6 for how a named specialist's experience may contribute to the two-platform requirement.

8. What happens after proposals are submitted, and when might interviews occur?

Proposals are due September 22, 2026 at 5:00pm ET. After the deadline, the review team will screen and score submissions and may invite top candidates to an interview or demonstration. Applicants should keep September 24 and September 28 available for potential interviews.

The anticipated schedule is consultant selection by October 1, contract finalization by October 9, and kickoff on October 13, 2026. Interview arrangements will be communicated to invited applicants.

Project Scope, Schedule & Contractor Role

9. Is the work mostly asynchronous and deadline-driven, or is there a set daily schedule?

The work will be primarily asynchronous and deadline-driven, rather than requiring a set daily schedule. Our team currently holds a weekly LMS SCRUM meeting on Fridays for project coordination. The selected contractor should expect to participate in regular check-ins during implementation. The meeting day and time can be adjusted based on contractor availability and project needs.

Key anticipated implementation milestones include:

- October 13, 2026: Consultant kickoff; Invest Appalachia content ready for the LMS vendor to begin uploading and implementation.
- November 17, 2026: Modules 1-9, facilitator content, and the asset library uploaded and integrated.
- December 15, 2026: Participant, Guest Speaker, and Facilitator user setup complete and ready for beta testing.
- January 15, 2027: Final change requests provided to the LMS vendor.
- January 31, 2027: Final LMS curriculum and architecture completed.

10. What percentage of the work is content design versus technical LMS setup?

We estimate approximately 10% content organization/design support and 90% technical LMS setup and implementation. Invest Appalachia will develop and provide the training content. The selected contractor will configure the LMS, organize and upload the provided content, set up the user experience and functionality, test the system, and support implementation and launch.

The contractor may recommend how content is worded, organized, or presented within the LMS, but creating the training content itself is not a primary responsibility of this scope.

11. Is a particular LMS platform required, and would a fully custom-built LMS be considered?

Invest Appalachia is open to vendors recommending the best-fit established LMS platform, such as Moodle, Canvas, WordPress LMS, or Open edX. There is no required underlying LMS engine.

We are looking for an established LMS provider/system rather than a fully custom-built LMS. We prefer a proven, maintainable system that can be supported over time without unnecessary dependence on a single developer or vendor. Applicants are welcome to recommend the established platform and configuration approach that best meet the RFP requirements. See Question 22 for live-session integration expectations.

12. What is the biggest limitation in the current training process that the new LMS should solve?

The primary challenge is scalability. Framer Training has been built and refined over several years and delivered primarily through virtual cohorts. Materials, participant and speaker information, assignments, and other resources are managed across Google Drive folders and separate tracking tools, requiring substantial manual updating and administration.

The goal is one centralized, branded system that reduces repetitive work and creates a consistent experience for Participants, Facilitators, Guest Speakers, Licensed Affiliates, and administrators. The architecture should also allow future flexibility in cohort-based and self-directed delivery, as described in Question 17.

13. Will Invest Appalachia manage the LMS after launch, or should the vendor provide ongoing administration?

Invest Appalachia expects to have internal staff responsible for ongoing LMS administration after launch. The vendor should provide the implementation, training, documentation, and post-implementation support described in the RFP, but is not expected to serve as the permanent day-to-day LMS administrator.

Users, Cohorts & Training Model

14. What user counts, cohort numbers, and growth assumptions should applicants use for planning?

For initial planning purposes, use the following estimates:

- 20 Participants per cohort.
- 2 cohorts per year, with the possibility of 3 cohorts in 2027.
- 3 Licensed Affiliates.
- 6 Certified Facilitators.
- 30 Guest Speakers.
- 1 System Administrator.

The Affiliate figure is an initial planning estimate; the exact pace of expansion after beta has not been finalized. These estimates may change as the program grows. The recommended solution should scale beyond them without major reconfiguration or re-platforming.

15. How long does a cohort run, and how much time do participants spend in live sessions and independent work?

A typical cohort runs for approximately four months, with sessions generally held weekly and some weeks off built into the schedule. The structure includes orientation, nine training sessions, and up to three Pitch Day sessions.

Each live training session is approximately 1.5 hours. Participants typically spend 1-2 hours on independent work or homework between sessions.

Each cohort also typically includes a few alumni networking sessions of about one hour each, plus approximately three optional mentoring/drop-in sessions where participants may meet with guest speakers or mentors. Mentoring sessions are generally 1-2 hours each.

16. Can a cohort have more than one Certified Facilitator at the same time?

Yes. A cohort may have more than one Certified Facilitator assigned concurrently, including co-facilitators or backup facilitators with appropriate access.

17. Is self-directed asynchronous learning required at the initial launch?

No. A fully self-directed learning option is currently aspirational rather than required for the initial launch. However, the architecture should avoid unnecessarily limiting the ability to add that option later.

Applicants should explain any additional cost or effort to accommodate future asynchronous/self-paced learning in the initial architecture, compared with adding that flexibility later.

18. Does a Participant who becomes a Facilitator need continued access to their own earlier assignments and progress?

We do not anticipate that continued visibility into a person's own earlier assignments or progress is needed simply because their role changes. Historical records should remain associated with the completed cohort for administration and reporting, while the person's new Facilitator permissions govern their access going forward.

Content, Technology & Integrations

19. What formats and volume of training materials exist, and will content need to be migrated from another LMS?

The existing nine-module curriculum is not currently housed in another LMS. Most materials are stored in a Google Drive folder and are primarily in standard, non-SCORM formats:

- Raw MP4 video recordings, primarily recorded through Zoom.
- PDF documents, including homework assignments, handouts, and other resources.
- Google Docs, including editable templates and documents participants may copy or customize.
- Google Sheets, including participant contact lists, speaker tracking lists, and other program management tools.

The curriculum contains fewer than 200 source files in total, including presentations, assignments, assessments, and supporting materials, with approximately 20-30 hours of recorded video. Applicants should recommend storage that accommodates this content and future cohort recordings and resources.

There are no existing SCORM, H5P, or HTML-based interactive learning packages requiring migration from another LMS. Invest Appalachia will provide the content and source files for organization, upload, conversion or adaptation as appropriate, and integration into the LMS.

20. Have the existing materials been reviewed for accessibility, or should applicants plan for remediation?

The existing PDFs, videos, Google Docs, and other training materials have not yet been fully reviewed for accessibility compliance. Applicants should account for accessibility review and reasonable remediation as part of organizing and implementing the content in the LMS.

21. What existing tools could the LMS connect with or reuse?

Invest Appalachia currently uses:

- Zoom for live virtual training sessions.
- DocuSign for electronic signatures.
- Salesforce for customer relationship management.
- Google Workspace/Google Drive for documents, spreadsheets, templates, and file storage.
- Asana for project and task management.
- Slack for internal communication.

Zoom, or a comparable approved live-training platform, is the primary required integration. Listing the other tools does not mean each must be integrated; direct Salesforce integration is not currently required.

Applicants may recommend tools for forms, application/scoring workflows, scheduling, reminders, and other functions. Where practical, we prefer reusing existing tools or native LMS functionality to avoid unnecessary recurring costs. Identify any proposed third-party costs and dependencies.

22. How should Zoom work with the LMS?

Invest Appalachia is seeking a simple, practical integration rather than a highly complex workflow. Participants should be able to easily access live-session links and receive reminders. Applicants may also recommend straightforward ways to support attendance tracking, recordings, and related follow-up communication.

23. Does protecting participant contact information from Speakers require a particular technical security design?

Speakers should not have access to participant email addresses or other private contact details. We do not require a specific field-level security architecture if the same outcome can be achieved reliably through platform configuration and permissions.

24. Will the existing training videos require editing, or only instructional design guidance?

Yes. The existing videos are pre-recorded Zoom sessions and will require some basic editing in addition to instructional design guidance. Applicants should anticipate providing basic video editing and design support, such as adding an opening slide with the training name, Invest Appalachia branding, and other basic formatting as appropriate before the videos are uploaded into the LMS.

Program Workflows & Configuration

25. How should applicants approach the participant application, review, and scoring workflow?

Invest Appalachia does not have a required external application or applicant-tracking system that must be integrated. Applicants may recommend native LMS functionality or an integrated tool, provided the workflow meets the RFP requirements and is practical and cost-effective.

We anticipate a numeric scoring approach, likely based on a simple configurable rubric. The exact scoring structure has not been finalized. Invest Appalachia should be able to configure or update scoring criteria over time without major technical changes.

26. Can Licensed Affiliates customize assessment questions for their cohorts?

Yes, while preserving standard required questions that remain consistent across cohorts. These questions support longitudinal data collection, comparisons over time, and program improvement.

Affiliates may add customized questions for their own cohort or local context, but may not replace, edit, disable, or remove Invest Appalachia's required standard questions. Changes to the standard questions are controlled by the System Administrator.

27. What completion and progression rules should the LMS use?

The exact rules have not yet been finalized. Invest Appalachia welcomes recommendations on a practical configuration, which could include module completion, assignment submission, attendance, assessment completion, or sequential progression.

Rules should be configurable so they can be adjusted as the program evolves without significant technical changes.

28. Does the Completion Record need to connect to an external accreditation or credentialing system?

No. The Completion Record is an internal Framer Training program completion record or certificate. There are no current external accreditation, continuing education unit (CEU), or third-party credentialing-system interoperability requirements.

29. What should applicants assume for the Speaker MOU and payment-request workflow?

Invest Appalachia currently uses DocuSign for electronic signatures. Applicants may recommend a more cost-effective approach, including a native LMS e-signature workflow, if it meets the program's needs.

When a Speaker requests payment, a simple internal notification to Invest Appalachia staff is sufficient. A direct finance or payment-system integration is not needed. Sensitive financial documents, including W-9s, should remain outside the LMS.