



West Ada School District
Purchasing Department

Request for Proposals (RFP) 831101

IDENTITY ACCESS MANAGMENT

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**WEST ADA PURCHASING DEPARTMENT
RFP 831101
IDENTITY AND ACCESS MANAGEMENT SYSTEM**

1 PURPOSE

The purpose of this Request for Proposals (RFP) is to select a vendor to build a Access and Identity Management System for West Ada School District (WASD).

The contact for this project is:

Mike Carrithers, Purchasing Agent
purchasing@westada.org
District Office
1303 E Central Drive
Meridian, ID 83642
208-350-5003

2 TIMELINES

Submit questions in writing to : purchasing@westada.org

**Deadline for Proposal Submission: Wednesday,
November 7, 2018 @ 4:00PM MDT**

Send a digital copy to purchasing@westada.org or include
with delivery of one Original proposal, five (5) copies:

**West Ada School District
ATTN: Purchasing
1303 E Central Drive
Meridian, ID 83642**

A mailing label is provided for your convenience

3 SPECIFICATIONS/SCOPE OF WORK

Public Record

All proposals will become public record ten (10) days after opening or upon award by the Board of Trustees, whichever comes first. Any material submitted as a Trade Secret must be sealed in a separate, sealed envelope that must be labeled "Trade Secret."

Responsibility of Proposers

The Proposer shall hold harmless from and indemnify the District against all claims, suits, actions, costs, counsel's fee, expenses, damages, judgment of degrees, by reason of any person or persons or property being damaged or injured by the Proposer or any of his sub-contractors, or any person employed under said Proposer or any of his sub-contractors in any capacity during the process of the work, whether by negligence or otherwise.

Each Proposer shall be held responsible for the execution of a satisfactory and complete piece of work in accordance with the true intent of the specifications. He shall provide, without extra charge, all incidental items required as part of his work, even though not particularly specified or indicated. He shall proceed with the work only with the understanding that a satisfactory and complete job will be required.

Materials and Workmanship

The Proposer shall, if required, furnish satisfactory evidence as to the kind and quality of his workmanship.

Compliance with Sexual Offender Law

Per Idaho Code 18-8329, the Proposer will prohibit any persons in their employ who are registered or required to register under the sex offender registration act from participation on this project if such participation would require them to enter upon school property. The Idaho/National Sex Offender Registry document must be included in the Proposer's submission.

Background Checks

The Proposer agrees to provide WASD with a list of all employees assigned to work on WASD property if your company is awarded this project and will provide updated lists if/when new employees are assigned to the project. Further, Proposer agrees to provide lists of all sub-contractor employees to WASD and will provide updated lists if/when new sub-contractor employees are assigned to the project. Please send the list of employees via email to purchasing@westada.org or submit in person to Kim Harp at the District Service Center.

4 CONDITIONS AND INSTRUCTIONS

4.1 Form of Proposal

- 4.1.1 You are hereby invited to submit a proposal for the Identity and Access Management System project for West Ada School District.

4.1.2 Proposals will be received by West Ada School District until 4:00 PM MDT, Wednesday, November 7, 2018. Any proposal received after this time and date will be returned unopened to the sender.

4.1.3 One original and five (5) copies of your Proposals plus a digital copy included or sent via e-mail are to be delivered to: West Ada School District, ATTN: Purchasing, 1303 E Central Drive, Meridian, ID, 83642.

4.1.4 Prices are to be F.O.B. School Site Location, West Ada School District.

4.1.5 Proposals are to include all applicable use tax, federal tax, permits and fees etc. Proposals should not include excise or other exempt taxes.

4.1.6 Oral, telephonic, or telegraphic Proposals or modifications will not be considered.

4.1.7 Proposals are to be held firm for ninety (90) days after the submission deadline date provided the proposal has not been withdrawn according to the provisions of Paragraph 4.2.

4.1.8 PREPARATION OF PROPOSAL:

Before submitting a Proposal, the Proposer shall thoroughly familiarize themselves with all Terms and Conditions and any addenda issued before the Proposal Submission Deadline. Such addenda shall form a part of the Proposal and shall be made a part of the Contract Documents. It shall be the Proposer's responsibility to ascertain that their Proposal includes all addenda issued prior to the Proposal Submission Deadline. Proposers should review carefully, information provided, to assure that they are thoroughly familiar with all the requirements, conditions and cost implications that will exist if a contract is awarded to them. No Proposal preparation costs will be assumed by WASD and are the vendor's responsibility.

The Proposer must satisfy themselves by personal examination and by such other means as they may prefer as to the actual conditions and requirements under which the service must be performed. If under inspection and examination by the Proposer there are any existing conditions or requirements of the service which are not completely understood by the Proposer, they shall submit questions in writing to purchasing@westada.org.

Proposers are expected to examine the specifications and all instructions of the RFP. Failure to do so will be at the Proposer's risk. Each Proposer shall furnish the information required by this RFP. The Proposer shall print or type his/her name on the Proposal and each continuation sheet on which he/she makes any entry. No erasures are allowed. Strike through any changes. Changes must be initialed by the person signing the bid with the corrections thereafter.

Envelopes must be sealed and clearly marked on the outside "Sealed Bid". Proposals submitted via "Express/Overnight" carriers, Express Mail, or other services which require the use of special, carrier supplied shipping envelopes must be sealed in a separate, inner envelope identified with the label supplied on the last page of this document and enclosed within the carrier's shipping container which must also be marked "SEALED BID". **No responsibility will attach to the District or any District employee for the pre-opening of, post-opening of, or the failure to open a Proposal not properly addressed and identified.** All Proposals must be submitted on the enclosed forms, signed by a legal officer of the company having the authority to bind, with company name, date, etc., and labeled as above, otherwise the proposal will be considered non-responsive.

4.1.9 ADDENDA:

The District shall not be responsible for oral interpretations given by a District employee, representative, or others. The issuance of a written addendum is the only official method whereby interpretations, clarification or additional information can be given that would change the terms and

conditions of the RFP. If any addenda are issued to this RFP, a good faith attempt will be made to deliver a copy of each to all prospective Proposers who were provided with a packet. However, prior to submitting the Proposal, it shall be the sole responsibility of each Proposer to contact Mike Carrithers, Purchasing Agent, (208)350-5003 to determine if addenda were issued and, if so, to obtain such addenda for attachment and acknowledge receipt of such addenda in the Proposal Submission Form. Failure to do so will cause the proposal to be considered non-responsive. Questions pertaining to this RFP must be submitted in writing to purchasing@westada.org.

4.2 Withdrawal of Proposal

- 4.2.1 Any Proposer may withdraw his/her proposal, either in person or by written request, at any time prior to the time set for the submission deadline.
- 4.2.2 No proposal may be withdrawn or modified after the time set for submission deadline, unless and until the award of the contract is delayed for a period exceeding sixty (60) days.
- 4.2.3 Request for withdrawal is in compliance with Idaho Code 54-1904(c).

4.3 Rejection of Proposal

- 4.3.1 The Board of Trustees reserves the right to accept or reject any and/or all proposals, or portions thereof, and waive any informality which is deemed to be in the best interest of the West Ada School District, including but not limited to:
- 4.3.2 Rejecting the proposal of a Proposer who has previously failed to perform properly or complete on time contracts of a similar nature.
- 4.3.3 Rejecting the proposal of a Proposer who has previously defaulted on any contract with WASD.
- 4.3.4 Rejecting the proposal of a Proposer who is not, in the opinion of WASD, in a position to perform the contract; and or all proposals when such reject is in the interest of WASD.

4.4 Acceptance of Proposal and Notice of Award

- 4.4.1 The contract shall be deemed as having been formed when formal notice of award (Notice of Award) shall have been duly given to the Proposer in writing, by some officer or agent of WASD, duly authorized to give such notice.
- 4.4.2 Contract time shall commence and Proposer shall start work on the date to be specified in the written "Notice To Proceed" from the District except that no work shall be started until the required Certificates of Insurance have been delivered to, and found to be acceptable to WASD.

4.5 Proposal Guarantees, Performance and Payment Bonds

- 4.5.1 A surety bond, certified check or cashier's check in the amount of five percent (5%) of the total Proposal, if over \$50,000.00, shall accompany each Proposal. The bond or check of all Proposers will be retained until the award is made to the successful Proposer, a contract is entered into and the Proposer furnishes a 100% Performance Bond and 100% Payment Bond.
- 4.5.2 Should a Proposer fail to enter into a contract or not furnish the required Performance Bonds within five (5) business days (or such other time as designated by purchasing) after his proposal has been accepted by the Notice of Acceptance, his bond guarantee will be forfeited to the District as liquidated damages, not as penalty.

4.6 Warranties, Guarantees

- 4.6.1 All Warranties and Guarantees shall commence on the date of final acceptance and run for the period specified in the Contract Documents. The Proposer is to supply all warranty documentation prior to issuance of final payment.

CONTRACT TERM/PRICING:

The term of this contract shall be the duration required to complete the project. Awards shall be made to the highest ranked Proposer in the opinion of and at the discretion of the Board of Trustees. The decision of the Board of Trustees shall be final and conclusive.

Information of the Proposal tabulation shall become public record ten (10) days after bid opening or upon approval by the Board of Trustees.

The contract may be canceled for poor performance of the contract requirements.

1. **AWARDS & RESERVATIONS:** The Board of Trustees (The Board) of West Ada School District reserves the right to:
 1. Reject all non-conforming, non-responsive, or conditional Proposals, to accept or reject any and/or all Proposals or portions thereof.
 2. Accept any part of the Proposals at prices quoted, to the best advantage of the District, unless Proposer positively limits his Proposal to "all or none".
 3. Waive any minor informality or irregularity (error/omissions) in any Proposal.
 4. To accept the bid or bids it deems to be in the best public interest.
 5. Award to the highest ranked Proposer in the opinion of and at their discretion. The decision of the Board shall be final and conclusive.

Proposals are subject to acceptance within sixty (60) days of submission deadline, and Proposals shall remain irrevocably in effect for ninety (90) days after submission deadline.

2. **DEFAULT BY PROPOSER:** The District shall hold the Proposer responsible for any damage which may be sustained because of the failure or neglect of the Proposer to comply with any term or condition listed herein, it being specifically provided and agreed that time shall be the essence of the contract delivery requirements. If the Proposer fails or neglects to furnish or deliver any of the materials, supplies or services listed herein at the prices named and at the time and places herein stated or otherwise fails or neglects to comply with the specifications and other terms of the contract, the District may, upon written notice to the Proposer, cancel the contract in its entirety or cancel or rescind any or all items affected by such default, and may, whether or not the contract is cancelled in whole or in part, purchase the materials, supplies or services elsewhere without notice to the Proposer. The prices paid by the District at the time such purchases are made shall be considered the prevailing market prices. Any extra cost incurred by such default may be collected by the District from the Proposer and the Surety on the performance bond, if any. Failure to pay said amount to the District upon demand will result in the company being removed from the bid list for a period of not less than three (3) years from the date of infraction. Thereafter, the Proposer may request to be reinstated to the bid list.
3. **ASSIGNMENT:** No contract awarded under this proposal shall be assigned except with the District's written approval.
4. **CONTRACT DOCUMENTS:** The complete purchase agreement includes but not limited to the following documents: The Advertisement for Proposals (when required), the RFP conditions, the specifications and drawings (if any), the Proposal of the supplier and its acceptance by the District, performance guarantee,

and all amendments thereto. Any of these documents shall be interpreted to include all provisions of the other documents as though fully set out therein.

1. FAIR EMPLOYMENT PRACTICES:

In the performance of this Contract, the Proposer will not discriminate against any employee or applicant for employment because of race, color, religion, ancestry, sex, age, disability, or national origin. The Proposer will take affirmative action to ensure that applicants are employed, and that employees are treated during employment, without regard to their race, color, religion, ancestry, sex, age, condition of disability, national origin or other prohibited reason. Such action shall include, but not be limited to, the following: employment, promotion, demotion or transfer; recruitment or recruitment advertising, layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The Proposer shall post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of the Fair Employment Practices Section.

The Proposer will permit access to their records of employment, employment advertisements, application forms, and other pertinent information and records by the Affirmative Action/Title IX Programs Section for the purposes of investigation to ascertain compliance with the Fair Employment Practices Section of the Contract.

5 INSURANCE

Within five (5) days of notification of award (or such other time as designated by Purchasing), the apparent successful Proposer will provide certificates of insurance required herein and will maintain the insurance during the life of the Contract. There is no provision for exceptions to this requirement. Failure to provide the certificates of insurance within the five (5) business day period may be cause for your proposal to be declared non-responsive or for your Contract to be cancelled.

Proposer shall carry liability and property damage insurance that will protect it and WASD from claims for damages for bodily injury, including accidental death, as well as for claims for property damages, which may arise from operations under the Contract whether such operations be by themselves or by anyone directly or indirectly employed by them.

Proposer shall not commence work under the Contract until it obtains all insurance required under this provision and furnishes a certificate or other form showing proof of current coverage to WASD. All insurance policies and certificates must be signed copies. After work commences, the Proposer will keep in force all required insurance until the Contract is terminated.

5.1 Commercial General and Umbrella Liability Insurance

Proposer shall maintain Commercial General Liability (CGL) and, if necessary, Commercial Umbrella insurance with a limit of not less than \$1,000,000 each occurrence for Bodily Injury, Property Damage and Products and Completed Operations. If such CGL insurance contains a general aggregate limit, it shall apply separately to the Contract.

5.1.1 CGL insurance shall be written on ISO occurrence form CG 00 01 (or a substitute form providing equivalent coverage) and shall cover liability arising from premises, operations, independent Proposers, products-completed operations, personal and advertising injury, and liability assumed under an insured contract (including the tort liability of another assumed in a business contract).

5.2 Commercial Automobile and Commercial Umbrella Liability Insurance

Proposer shall maintain Commercial Automobile Liability and, if necessary, Commercial Umbrella Liability insurance with a limit of not less than \$1,000,000 each accident. Such insurance shall cover liability arising out of any auto (include owned, hired, and non-owned autos).

5.2.1 Proposer may request a waiver from providing Commercial Automobile and Commercial Umbrella Liability Insurance in its Proposal if the Proposer will not use any owned, hired or non-owned vehicles to conduct business under the Contract, if it is awarded the Contract, WASD will consider the request. If the Proposer submits a request to waive the provision of Commercial Automobile and Commercial Umbrella Liability Insurance after the due date and time for receipt of Proposals, WASD may not consider the request.

5.3 Worker’s Compensation Insurance and Employer’s Liability

Proposer shall maintain workers compensation and employer’s liability insurance. The employer’s liability shall have limits not less than \$1,000,000 each accident for bodily insurance by accident or \$1,000,000 each employee for bodily injury by disease.

5.3.1 Proposer must provide either a certificate of workers compensation insurance issued by a surety licensed to write workers compensation insurance in the State of Idaho, as evidence that the Proposer has in effect a current Idaho workers compensation insurance policy, or an extraterritorial certificate approved by the Idaho Industrial Commission from a state that has a current reciprocity agreement with the Idaho Industrial Commission.

5.4 Notice of Cancellation or Change

Proposer shall ensure that should any of the above described policies be cancelled before the expiration date thereof, or if there is a material change, potential exhaustion of aggregate limits or intent not to renew insurance coverage(s), that written notice will be delivered to WASD in accordance with the policy provisions.

5.5 Reporting Provisions Non-Compliance

Proposer shall further ensure that all policies of insurance are endorsed to read that any failure to comply with the reporting provisions of this insurance, except for the potential exhaustion of aggregate limits, shall not affect the coverage(s) provided to WASD, and its schools, officers and employees.

5.6 Waiver of Subrogation

All policies shall contain waivers of subrogation. The Proposer waives all rights against WASD and its officers, employees, and agents for recovery of damages to the extent these damages are covered by the required policies. Policies may contain deductibles but such deductibles will not be deducted from any damages due to WASD.

List of Attachments	Required Submittal Items
Attachment 1-Proposal Submission Form	Attachment 1-Proposal Submission Form
Attachment 2-Idaho National Sex Offender Registry	Attachment 2-Idaho National Sex Offender Registry
Attachment 3-Alcohol/Drug Affidavit	Attachment 3-Alcohol/Drug Affidavit
Sealed Bid Label	

ATTACHMENT 1
PROPOSAL SUBMISSION FORM

TO: WEST ADA SCHOOL DISTRICT
1303 EAST CENTRAL DRIVE
MERIDIAN, IDAHO 83642

The Proposer, in compliance with your Request for Proposals for the construction of an **Access and Identity Management System** for West Ada School District, having examined the specifications and other related documents, hereby proposes to construct the requested items for the price stated below. Price is to cover all expenses incurred. Proposal price must be honored for ninety (90) days from the date of the Request for Proposal submission deadline.

Proposer acknowledges receipt of addenda #1 ___ #2 ___ #3 ___ #4 ___ #5 ___.
(INITIAL TO ACKNOWLEDGE)

BASE PROPOSAL: Proposer agrees to provide an Access and Identity Management System as described in section IV, Detailed Requirements. Base proposal should be the sum of the required items only.

_____ Dollars (\$ _____)
(Amount shall be shown in both words and figures. In case of discrepancy, the amount shown in words will govern.)

OPTIONAL REQUIREMENTS: Any optional requirements provided at additional cost, as described in Section IV Detailed Requirements, are to have the costs individually itemized and attached as a separate schedule to your proposal.

NAME OF COMPANY _____

MAILING ADDRESS _____

CITY, STATE, ZIP CODE _____

PHONE (_____) _____ FAX (_____) _____

SIGNATURE OF PRINCIPAL OR OFFICER _____

PRINTED NAME AND TITLE _____

E-MAIL _____

SIGNED THIS _____ DAY OF _____, 2018

**THIS PROPOSAL SUBMISSION FORM MUST BE INCLUDED WITH THE PROPOSAL
FOR RFQ 831101**

ATTACHMENT 2

IDAHO/NATIONAL SEX OFFENDER REGISTRY

Idaho Code §18-8329 prohibits any person who is registered or required to register under the Idaho Sex Offender Registration Act from being on school property if the person has reason to believe children under the age of 18 are present. West Ada School District (WASD) Policy 504.81 reads, in part:

It is prohibited for any person who is currently registered or required to register under the sex offender registration act as provided in Idaho Code 18-8329 to apply for/accept employment, or to volunteer at a school, or to be upon or to remain on the premises of a school or facility owned by West Ada School District while children are present.

As a provider of goods and/or services to WASD, your company and those in your employment are subject to this law and district policy.

Please sign and return this letter confirming to the District that your company will prohibit any persons in your employ who are registered or required to register under the Idaho Sex Offender Registration Act from participation in company business with the District if such participation would require them to be present on school property. Further, by signing, you confirm that you have crosschecked such employees against the Idaho Sex Offender Registry and the National Sex Offender Registry found at the following web links:

www.isp.idaho.gov/sor_id/

<http://www.nsopr.gov/>

In addition, by signing, you agree to provide WASD with a list of all employees assigned to work on WASD property if your company is awarded the project and will provide updated lists if/when new employees are assigned to the project. Further, you agree to provide lists of all subcontractor employees to WASD and will provide updated lists if/when new subcontractor employees are assigned to the project. Please send the list of employees via email to purchasing@westada.org or submit in person to Kim Harp at the District Service Center.

Company/Proposer Name (Print)

Signature of Company/Proposer Representative

Printed Name

Date

THIS COMPLETED DOCUMENT MUST BE RETURNED WITH YOUR PROPOSAL

ATTACHMENT 3

PROPOSER/VENDOR AFFIDAVIT

CONCERNING ALCOHOL AND DRUG-FREE WORKPLACE

STATE OF _____

COUNTY OF _____

Pursuant to the Idaho Code, Section 72-1717, I, the undersigned, being duly sworn, depose and certify that _____ is in compliance with the provisions of Idaho Code section 72-1717; that _____ provides a drug-free workplace program that complies with the provisions of Idaho Code, title 72, chapter 17 and will maintain such program throughout the life of a state construction contract and that _____ shall subcontract work only to subcontractors meeting the requirements of Idaho Code, section 72-1717(1)(a).

Name of Proposer

Address

City and State

By: _____
(Signature)

Subscribed and sworn to before me this _____ day of _____, 20____.

NOTARY PUBLIC, residing at

Commission Expires

THIS COMPLETED DOCUMENT MUST BE RETURNED WITH YOUR PROPOSAL

I. Cover Page

RFP PROJECT TITLE: Identity and Access Management System

PURPOSE OF REQUEST FOR PROPOSAL (RFP): Joint School District No. 2, doing business as the West Ada School District (WASD), is seeking to identify and select a vendor to provide an Identity and Access Management (IAM) system, perform the system setup necessary to automate WASD staff and student onboarding and offboarding, and provide technical assistance with implementation. The IAM system must be able to provide the following major components:

- Automation of access based on role within the District and responsive to hiring, position changes, and termination (onboarding and offboarding)
- Bi-directional communication with third-party applications
- Implementation of a user portal linking to available resources
- A non-technical UI for authorized users to grant access through a Single Sign-On (SSO)
- Extensive reporting and auditing tools

TIMELINE

- RFP Issued: October 17th, 2018
- Last Day for First Round Questions: October 29th, 2018
- Vendor Responses Due: November 7th, 2018
- Second Round Announcements: November 16th, 2018
- Last Day for Second Round Questions November 20th, 2018
- Second Round Presentations: November 28th - 30th, 2018
- Questions to Vendors and Responses: December 1st – December 15th, 2018
- Vendor Selection: January 15th, 2019
- Contract Signed: January 22nd, 2019

II. Introduction

a. Organizational Background

WASD is the largest school district in Idaho, educating a diverse population of approximately 40,000 Pre-K through 12th grade students and a staff of 4,000 in 60 sites and locations. WASD is focused on providing a quality education to all students with an emphasis on academic performance, providing several programs and extracurricular activities to its community of learners.

A large part of WASD's curriculum contains digital resources necessary to provide every child the experience and ability to succeed in the information age. This includes dozens of specialized applications available within our network. Both students and staff need consistent and on-demand access to these resources, often at multiple site locations.

b. Project Purpose

WASD currently uses a combination of tools, communication channels, and manual updates to provide students and staff with the needed access for all digital resources. This methodology has become increasingly complex and difficult to implement in a timely manner with the district's growth and the proliferation of digital technology.

WASD seeks a vendor who can provide a unified system of Identity and Access Management to manage all accounts and access with a Single Sign-On and allow access to all user resources through a single portal (a listing of the primary account management systems is listed "V. Proposal Submission Information, d. Systems Experience and Compatibility Table") It is preferred that the IAM system have native compatibility with many of these systems, and it will need the extensibility to work with those it is not natively compatible with. The system must have the capability to perform workflow automation based on data from those systems and provide each user with the necessary access. WASD needs the ability to authorize users to selectively enable access, or request access, for users. The system must be able to differentiate access based on users' site location(s). The system should allow for multiple tiers of authorization on privileged access requests. The workflow must be responsive to approvals and denials. The authorized users must be able to do this in a UI that is friendly to a non-technical user.

The IAM system must be supported by a thorough reporting and auditing system that is able to collate all changes in access, current users logged into the UI, and change control reporting on authorized and denied requests. The IAM must have the ability to perform audits and issue alerts to staff members based on audit results. It must have a reporting interface to generate these reports both textually and graphically.

c. Project Goals / Project Scope

WASD's goal is to work with a vendor to fully automate account onboarding/offboarding and access for the accounts based on role within the school district and site location(s) through an IAM system.

WASD personnel will require training in the use of the IAM system sufficient to understand the implementation. Further training will also need to encompass all features of the IAM in order for WASD staff to continue development of the system towards future goals.

As part of the response to RFP, WASD requests a complete listing of equipment requirements (including both hardware and software) for the IAM system, pricing that includes upfront licensing fees, implementation costs, and ongoing annual licensing/maintenance fees. WASD also requests the vendor provide an outline of the expected implementation timeline. The top three scoring vendors will be asked to provide a demonstration showing how their system handles a variety of tasks to be selected by WASD.

d. Project Plan

Vendor will work with WASD to integrate the IAM and perform an evaluation of all business rules necessary for automation of the onboarding/offboarding process for users. Once a plan has been created and agreed upon, the vendor will build the automation and have it ready for initial testing by a date to be determined by WASD and the selected Vendor. Vendor will provide sufficient training to WASD staff to perform any needed maintenance or customizations to the process, including business rules and workflow modifications, to be completed by a date agreed upon by WASD and the selected Vendor. The Vendor and WASD will plan a training schedule to cover all IAM features. WASD and the selected Vendor will establish a date by which the automation is expected to be fully in place and functioning.

e. Solution Use Cases

The following Use Cases demonstrate onboarding/offboarding scenarios within the district.

Use Case 1. Digital Integration Specialist, working at three locations

A staff member is hired on as a Digital Integration Specialist (DIS), and also holds a Vice-Principal Role. The user has a primary site as a vice-principal, but commonly works at two additional sites as a DIS. The user needs access at the three site locations to access each site's resources. The user needs access granted based on their role at the site. Only the user's primary location is listed in the data sources. After being hired, the user has a non-primary location reassigned and the user will need to have access revoked from the previous site's resources and gain access to the user's new site.

Use Case 2. School Resource Officer

A School Resource Officer (SRO) has been assigned to assist at a school. This is a position filled through the local police department and the SRO does not have an entry created in BusinessPLUS. The SRO is expected to have access to security cameras and school files. They

will also need to access to the sites they visit which is granted via the district's Access Control Management system.

Use Case 3. Student Teacher to Substitute Teacher to Teacher

A student teacher that works at the district has applied to be a substitute teacher. The staff member's new role as a substitute teacher includes different access than the staff member's role as student teacher. A year later, the staff member is hired on as a full-time teacher and now needs teacher-level access at the staff member's new location.

Use Case 4. Student at multiple locations

A new student is attending multiple schools. The student will need to receive all necessary access and tracking for both sites.

Use Case 5. Returning Teacher

A teacher is hired who has not worked for the district for years. The teacher's access must be updated to current standards. The teacher's account was not active during the transition to the IAM system.

Use Case 6. Terminated Employee

An employee whose planned termination was scheduled for the month's end has their employment terminated two weeks before the planned time. Access to all systems must be immediately revoked for the terminated employee.

f. System Processes and Architecture

WASD currently creates accounts by using a combination of SQL, PowerShell, and manual entry to update Active Directory/Azure. When possible, information is drawn from the HR Software BusinessPLUS and from the Education Technology Platform PowerSchool via PowerShell. When accounts are required but neither system has sufficient information an account in Active Directory/Azure is manually created which then triggers automation sequences to complete the account creation process. After account creation it is not unusual for additional permissions to be granted manually based on users' specific roles.

III. Scope of Work

a. Deliverables

Deliverable 1. Final Project Plan

The vendor will engage with WASD personnel to finalize the requirements for the Project.

Based on the cooperatively identified requirements, the Vendor will produce a Final Project Plan. The Final Project Plan will specifically include the following elements:

Deliverable 1.1. Installation Plan

The Vendor will work with WASD personnel to develop a timeline for equipment installation, readiness testing, and final installation of the IAM system.

Deliverable 1.2. Training Plan

The vendor will work with WASD to schedule personnel training which will sufficiently cover the installation process of the IAM system and the implementation of the onboarding/offboarding rule automation. Further training will be scheduled to continue training of WASD personnel on all aspects of the IAM necessary to WASD's goals.

Deliverable 1.3 Onboarding/Offboarding Automation

The vendor will create a solution for onboarding/offboarding automation following the guidelines put forth. WASD personnel will work with the Vendor to review and refine the automation rules and agree upon a date for completion of all automation rule documentation.

Deliverable 2. Testing

Deliverable 2.1 Integration of IAM system

The vendor will work with WASD personnel to ensure all hardware and data preparations for the IAM system integrations are in place and proceed with integration of the IAM system to a point where initial testing may occur.

Deliverable 2.2 Automation Testing

The vendor will review the automation testing performed, provide feedback, and make any adjustments necessary to the workflow with documentation updated to reflect the changes.

Deliverable 3. Deployment

Deliverable 3.1 Implementation

Upon agreement between the Vendor and WASD personnel that both the IAM system and all automation rules are sufficiently established, the Vendor will work with WASD personnel and move the IAM system to full deployment and transition the day-to-day ownership of the project to the WASD personnel

Deliverable 3.2 Technical Support

The Vendor will continue to provide technical and post-implementation support consistent with the terms of the contract.

IV. Detailed Requirements

Request	Identity and Life Cycle (ILC)	Requirement
ILC-01	Offer ADFS/SAML or AzureAD connector Single Sign-On to WASD resources from a portal	Required
ILC-02	Single Sign-on portal supports popular web browsers (Internet Explorer, Firefox, Safari, and Chrome)	Required
ILC-03	MFA compatibility with Microsoft, preferably able to use Microsoft or Google authenticator app, ability to not require MFA when on local network	Optional
ILC-04	Interface to have user “claim” identity via personal information key(s) and enforce account norms (passwords, MFA, etc.) once claimed.	Optional
ILC-05	Content accessible from multiple operating systems, including iOS and Android	Required
ILC-06	Provides session management for portal, including global session timeouts, computer/device inactivity timeouts, failed authentication actions, and post-authentication actions	Required
ILC-07	Offer provisioning tools to centralize identity and access management administration for all resources under one portal	Required
ILC-11	Role-based security for portal functionality and for access outside of portal	Required
ILC-08	Support Self-Service password resets	Required
ILC-09	Bring-your-own-device (BYOD) compatible	Required
ILC-10	Alternate authentication method (QR Code/Camera or other)	Optional
Manual Workflow (MW)		
MW-01	Utilize custom fields connected to Active Directory or other third-party programs which can then be edited and updated through the UI	Required
MW-02	Utilize custom groups connected to Active Directory or other third-party programs which can then have memberships added or removed through the UI	Required
MW-03	PowerShell scripts and modules able to be used during workflow process	Required
MW-04	Enable users to request access and grant access through UI	Required
MW-05	Grant staff role-based security profiles	Optional
MW-06	Grant access to users by one or more site locations through UI	Required
MW-07	Update employee site location(s) through UI	Required
MW-08	Set time-gated access granted through UI	Required
MW-09	Reset user passwords for specified users through UI	Required
MW-10	Workflow from manual changes via UI take place in real-time and sends updates to corresponding system software	Required
MW-11	Communicate with UI through phone or e-mail	Optional
Automated Provisioning and Role Management (APRM)		

APRM-01	Integrate with current systems (primary examples include Active Directory, BusinessPLUS, and PowerSchool)	Required
APRM-02	Bidirectional communication with third party applications	Required
APRM-03	Automated access based on role in district, with optional sub-roles or modifications to roles	Required
APRM-04	Automatic provisioning or re-provisioning of staff to least-privileged for their role	Required
APRM-05	Update and remove access based on real-time system and employment changes	Required
APRM-06	Respond to a change in employee access due to status, role, or a granted access request with reports sent (or available to) to specific parties	Required
APRM-07	Automated account creation and access granting for non-standard employees	Required
APRM-08	Copy an access profile for reuse on other groups or staff	Optional
APRM-09	Time-gated access delegation	Required
Auditing, Reporting, and Analytics (ARA)		
ARA-01	Analytics on applications launched through user portal	Optional
ARA-02	Reports on organizational authorization access, preferably visual and textual options	Required
ARA-03	Alerts for access expirations	Optional
ARA-04	Alerts for system outages or maintenance	Required
ARA-05	Audit users logged into portal and attempts to log into portal	Required
ARA-06	Customizable alerts for specific user or access state changes	Optional
ARA-07	Thorough logging for access changes, including historical reports on access granted/revoked	Required
ARA-08	Edit and review workflow processes including onboarding/offboarding users	Required
ARA-09	Grant users authority to view auditing and reports by location, group, or other criteria	Required
ARA-10	Notification logs and/or dashboard for completion status of workflow tasks and error reporting for failed workflow tasks	Required
Specific Compatibility Requirements (SCR)		
SCR-01	VMWare support for esxi 6.5, Vsphere 6.5, VMhardware version 11 or later	Required
SCR-02	Windows Server 2016 support preferred, Server 2012R2 acceptable	Optional
SCR-03	F5 load balancer supported if the system is clustered	Required
SRC-04	HTML5 web portal	Optional

V Proposal Submission Information

a. General Guidance

Respondents should review and agree to the Terms and Conditions section of this document before responding. WASD is not liable for any cost incurred by Vendors in replying to this RFP.

b. Response Form

The following is a suggested outline, respondents may elect to use their own. Responses are not to exceed 75 pages in any case.

- Table of Contents
- Executive Summary
- Proposed Solution
 - Overall Solution Design
 - Implementation and required equipment estimated costs with on-prem/cloud pricing comparison
 - Training and estimated costs
 - Project Use Cases
 - Support Costs
- Project Plan (including tasks, implementation schedule, resources)
- Post Implementation Support Details
 - Cost of yearly support for software support as well as technical support if priced separately
 - Support communication methods (email, phone, chat, etc.) and typical support process
 - Emergency escalation process
- Technical documentation (or access to technical documentation) developed for management of IAM, particularly documents discussing installation, extensibility, and reporting/auditing
- Identified or Assumed Risks, Mitigation Plans, Failover over or high-availability options
- Vendor Experience and Expertise
 - Specific Expertise implementing IAM within school K-12 school districts
- Estimated Costs (including travel & expenses)
- Appendices
 - Key Personnel Resumes
 - References
 - Technical Graphics

c. Evaluation Criteria

The following are the evaluation criteria WASD plans to use to select a vendor.

- Quality of Proposal (10 pts.)
- Use Case Solutions (30 pts.)
- Technical Requirements (20 pts.)
- Technical Documentation (15 pts.)

- Project Plan (25 pts.)
- Support Plan (25 pts.)
- Risk and Mitigation Assessment (5 pts.)
- Compatibility with Existing Programs (15 pts.)
- Customization Extensibility (15 pts.)
- Vendor Experience (10 pts.)
- Vendor Expertise (10 pts.)
- Costs (20 pts.)

d. Systems Experience and Compatibility Table

The below is a list of some of the software used within our system. For the Receive and Send options under “Compatible with IAM System” please write Yes or No if the IAM system is natively compatible. If unfamiliar with the software, please simply mark under “Unsure” with a checkmark or an X. If you have any experience implementing the IAM system with the software, please mention it in the “Vendor Experience and Expertise” part of your response.

Software	Compatible with IAM System		
	Receive	Send	Unsure
Active Directory			
Microsoft Azure			
BusinessPLUS			
Follett's Destiny			
PowerSchool			
Enrich			
Blackboard			
Cisco UCCM			
Cisco Unity			
O365			
Frontline			
Horizon			
SNAP			