Request for Information No. I
RFP No.24/25-04 Identity Management Solutions
October 23, 2024

Response to Proposers' Questions

1.1   **Question**: How are Ed Tech JPA RFPs run and awarded?

   Answer: Ed Tech JPA offers multiple awards so its members can leverage the vendors that best meet their needs. Ed Tech JPA's RFP team will review Vendor Proposals and award to Vendors who comply with all terms and conditions (no substantial exceptions) and meet all essential requirements. Essential requirements are denoted in the RFP with double asterisks and green highlighting.

   Vendors should also answer non-essential criteria (blue highlighting) to the best of their ability. Ed Tech JPA members vary in size from 1,500 ADA to 600,000 ADA, and have different needs. Ed Tech JPA will make all prevailing Proposals available to members for review. Members will determine what requirements are most important to them and use the information in Proposals to determine which Vendor best fits the needs of their organization.

   Vendors who meet all essential requirements (green, double asterisks) and agree to the terms and conditions will be considered for award contingent upon successful contract negotiations. Non-essential criteria (blue) are optional. Vendors are encouraged to respond to non-essential criteria so member districts can make a determination regarding which solution is the best fit for their needs.

   Additionally, the Functionality and Usability RFP is sectioned into different modules. Essential requirements are required only to be considered for award in those specific sections. For example, if a vendor agrees to all terms and conditions and meets all essential requirements for sections 3.1 - 3.4, but not for sections 3.5 - 3.11 they will be awarded for sections 3.1 - 3.4. Below is an example of a possible award scenario.

Vendor	3.1 General	3.2 Account Lifecycle Management	3.3 Password Management & User Self Service	3.4 Role-Based Access Control (Groups)	3.5 Single Sign-On
Vendor A	Yes	Yes	Yes	Yes	Yes
Vendor B	Yes	Yes	Yes	Yes	No
Vendor C	Yes	No	No	No	Yes

JPA members have varying needs, and some may require services for only some modules included in this RFP. Members will evaluate Proposals based on their specific needs, so please include a clear description of what your solution offers.

If offering multiple separate solutions please be clear in your proposal which solution meets each criteria by either including separate sections for each product, or differentiating in responses:
Example 1:
3.1 - Product 1 Name response to all criteria
3.2 - Product 1 Name - no response

3.1 - Product 2 Name - no response
3.2 - Product 2 Name response to all criteria

Example 2:

**2.1.5 Specify whether the Solution is Vendor-hosted (web/cloud-based) or Participant hosted (on-premise).
Product 1 Name : *Our assessment solution is web/cloud based…* **Product 2 Name :** *Our analytics solution is on-premise….*

Please also be sure to list each product separately in the Pricing Form.
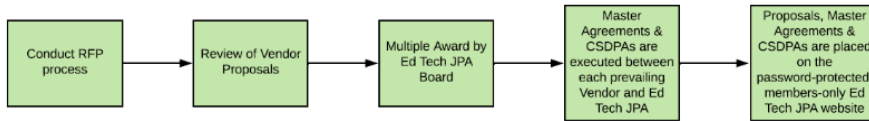
1.2   **Question**: Are contracts available for future Ed Tech JPA members as well, or just to members at the time the RFP is run?

        Answer: When a member joins Ed Tech JPA it can leverage any current or previously awarded contract. The membership process is very quick and straightforward. There are no fees for members to join. Ed Tech JPA provides sample board agenda and resolution templates for members in an effort to assist members with their boards' required approvals. The Ed Tech JPA Membership site contains detailed instructions for prospective members.
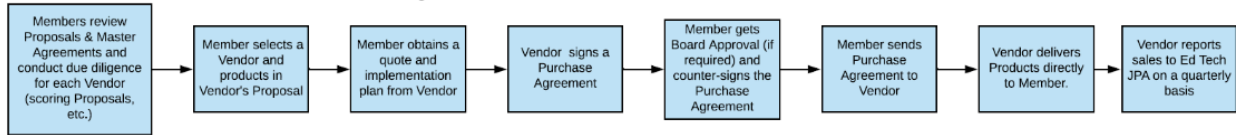
1.3   **Question**: Once the RFP is awarded, how do Ed Tech JPA members enter into agreements with awarded vendors?

        Answer: Prevailing vendors will enter into a Master Agreement with the Ed Tech JPA. When JPA members elect to purchase a vendor's product they will enter into a Purchase Agreement between the vendor and JPA member. Samples of the Master Agreement and Purchase Agreements are included as Appendix A of the RFP. For additional clarity please refer to the illustration below.

Ed Tech JPA:
RFP Award & Master Agreement Execution

Conduct RFP process → Review of Vendor Proposals → Multiple Award by Ed Tech JPA Board → Master Agreements & CSDPAs are executed between each prevailing Vendor and Ed Tech JPA → Proposals, Master Agreements & CSDPAs are placed on the password-protected, members-only Ed Tech JPA website

JPA Member:
Vendor Selection & Purchase Agreement Execution

Members review Proposals & Master Agreements and conduct due diligence for each Vendor (scoring Proposals, etc.) → Member selects a Vendor and products in Vendor's Proposal → Member obtains a quote and implementation plan from Vendor → Vendor signs a Purchase Agreement → Member gets Board Approval (if required) and counter-signs the Purchase Agreement → Member sends Purchase Agreement to Vendor → Vendor delivers Products directly to Member. → Vendor reports sales to Ed Tech JPA on a quarterly basis

1.4   **Question**: Why is the JPA releasing a new RFP, when there are already identity management agreements awarded under the previous Ed Tech JPA RFP from 2020?

     Answer: Ed Code section 17596 limits contract terms to a maximum five (5) years. The previous RFP for identity management solutions was awarded in December 2020. Releasing this RFP allows for award and contract negotiations with responsive vendors with no lapse in contract availability for identity management solutions for Ed Tech JPA's members.

1.5   **Question**: Could you please confirm if [Vendor Name] needs to be involved in this? I noticed that last year's amendment extends us until January 12, 2026. Would it be possible to amend that agreement again if needed?

     Answer: If Vendor wishes to extend the agreement (or allow purchases after) January 12, 2026, Vendor must respond to the current RFP and be selected for award. The current Ed Tech JPA agreements in place with vendors awarded as a result of RFP No. 20/21-01 have a limited term left. Ed Code limits agreements to five year terms. Formal procurements and contract negotiations are a timely process, and Ed Tech JPA only re-issues RFPs every 4 – 5 years. Ed Tech JPA welcomes proposals from new and existing vendors so our members have continuous services available from the best providers.

1.6   **Question**: Our current contract has a term end date of Jan. 13, 2026. So will the new RFP supersede our current contract in place?

     Answer: This RFP has an anticipated award date of February 27, 2025 and contracts will be negotiated and finalized after award. The timeline for contract negotiations can vary greatly, depending on vendor responsiveness and willingness to work through critical issues. If vendor agreements are finalized prior to the expiration of the vendor's previous agreement vendor's may elect to make the previous agreement no longer available for members.

1.7   **Question**: We are interested in attending the pre-proposal conference on October 17, and I wanted to confirm whether this time is in PST. I look forward to your response so I can ensure it's accurately represented on my calendar, as I am in the EST time zone.

Answer: All times referenced in the RFP are pacific time.

1.8   **Question**: If additional colleagues wish to join, do you need a separate RSVP from them?

Answer: It's best to RSVP for all colleagues attending the Pre-Proposal Conference, however if they do not RSVP they may still join the conference.

1.9   **Question**: Is it possible to get the RFP in Word format as well?

Answer: Vendors may download the Response Template provided on the website in Word format. The Response Template must be downloaded prior to being completed.

1.10   **Question**: Where does this RFP sit in the mix of what is already established?

Answer: [Context: Question related to whether there are established providers likely to meet the requirements of this RFP] Ed Tech JPA believes that there are several existing providers in the identity management field that are likely to satisfy the essential requirements of this RFP.

1.11   **Question**: We are a development company that is considering proposing services to create a solution, but aren't sure if that will meet the JPA needs or if there are already sufficient solutions in the identity management space.

Answer: Ed Tech JPA members vary in size from 1,500 ADA to 600,000 ADA, and have a variety of different needs. Interested members will select the awarded product that bests their unique needs. Different organizations may have very different preferences for Solutions that are fixed/fully developed and Solutions that can be modified or custom-built to meet their needs. *Regardless of the Vendor's approach, a Solution must meet all of the required criteria within a section to be considered for award for that section of the RFP.*

Typically, Ed Tech JPA Members are looking to purchase a solution in the near term when they evaluate proposals. Ed Tech JPA will score proposals with consideration for existing features of the proposed Solution. Features included in the proposal should clearly denote if they are currently Showcase what you already have and then demonstrate what can be developed on top of the existing system.

To be awarded for a custom-built solution, a Vendor would need to demonstrate that they have built and sold a comparable product in the past. Vendors proposing a custom-built solution should be clear about what features are readily available (e.g., previously-developed products/code that could be reused), and which features would require new development or customization for the proposed Solution

(including an anticipated timeframe), and all costs (including development, licensing, professional development, etc). Additionally, if the proposed Solution is dependent on any third-party products, Vendors must be clear about assumptions/responsibilities related to licensing requirements.

1.12 **Question**: Is this proposal similar to the one that was issued 4-5 years ago?

Answer: Yes, the Request for Proposals has been updated to reflect current market conditions and our member's needs but remains similar. Ed Tech JPA reissues RFPs to ensure successor agreements are in place when current agreements expire. Ed Code limits the duration of agreements to a maximum of five years.

1.13 **Question**: Since there can be multiple vendors awarded under this RFP, you do not need to be awarded for each section correct?

Answer: Yes, after award Ed Tech JPA typically lists awarded vendors and the awarded functionality and usability sections on the website so that members can see which solutions are most likely to meet their needs. Please see RFI No. 1.1 for additional details.

1.14 **Question**: In terms of formatting, the RFP came to us in PDF format, is there a Word version available for vendors as well?

Answer: Yes, underneath the PDF version on the website, there is a link to the response template so you can download it in whichever format you need.

1.15 **Question**: How many vendors are typically awarded for this sort of RFP?

Answer: It varies. Last time we ran an identity management RFP Ed Tech JPA awarded to five vendors. Other procurements have had a varied number of awarded vendors, ranging from 1 - 18 awarded vendors.

1.16 **Question**: Is section 1.5 of the RFP more geared toward construction bids?

Answer: Criteria number 1.5 reads "Confirm that Vendor will acquire and adhere to any applicable permits, fees, inspections, and construction administrative requirements. Confirm that a copy of all applicable permit applications and, upon issuance, all approved permit(s) shall be provided to the Participant."

This is standard language we include in all RFPs per our County requirements. Construction permits and inspections are unlikely to be applicable to projects/contracts resulting from this RFP. Instead, this clause would apply to appropriate business permits.

1.17 **Question**: Is there a specific number of vendors the Ed Tech JPA looks to award to?

Answer: No. Ed Tech JPA awards to all responsive vendors who agree to Ed Tech JPA's terms and conditions and meet the minimum required criteria. Ed Tech JPA typically asks responding vendors clarifying questions after reviewing proposals to be sure we make informed decisions when awarding. The number of awarded vendors ranges in number depending on the number of qualifying vendors. The goal in awarding all responsive vendors is that Ed Tech JPA members can further evaluate awarded vendors to determine which one meets their specific needs.

1.18   **Question**: Is the purpose of the RFP to establish a master agreement for a pool of districts to make a single purchase together?

Answer: The goal of Ed Tech JPA is primarily to streamline the procurement process. At this point Ed Tech JPA members do not typically pool together to make purchases, largely due to the complexity of different member's needs and different contracting timelines. Please see RFI 1.3 for details about the way agreements are structured.

1.19   **Question**: Are you all expanding beyond CA? I believe I noticed districts/schools in other states that were members.

Answer: We currently have three members located outside of California. Any public agency in the United States is eligible to join the JPA and use JPA procurements. This may include, but is not limited to, school districts, county offices of education, public colleges, charter schools, city governments, and state government agencies. You may share the information below with any prospective customers outside of California that are interested in becoming an Ed Tech JPA Member.

Potential members outside the State of California should verify with their legal counsel that:
(1)   The applicable state (and any other governing board the potential member is subject to) allows such a membership, and
(2)   The procurement practices followed by the JPA meet all of the requirements the potential member is subject to. Some of the things to take into consideration include:
a.   The JPA is a Public Agency (California Government Code sections 6500 and 6502 authorizes the joint exercise by two or more public agencies of any power common to them as a Joint Powers Authority (JPA)).
b.   Ed Tech JPA follows California and Federal Procurement Guidelines
c.   All agreements and RFPs have been vetted by Fagen, Friedman & Fulfrost LLP (F3), our general counsel for adherence to California and federal procurement and privacy laws.
d.   RFPs are posted publicly on the Ed Tech JPA website for at least one month
e.   RFPs are advertised twice in a newspaper of wide circulation (OC Register)
f.   The Ed Tech JPA makes a multiple award and the member scores proposals for a final decision. Members are directed to use price as the primary consideration, consistent with federal law.
g.   Ed Tech JPA is governed by a board made up entirely of public officials (CBOs/CTOs from our founding members)
h.   Ed Tech JPA collects an administrative fee based on the sales of our vendors. Ed Tech JPA uses the fee to fund operating costs (e.g., insurance, RFP advertisements), and legal fees.

1.20　　**Question**: Our team typically likes having bids delivered a day before the due date. With Dec. 2nd being a Monday, and the Thanksgiving holiday the week before, will the District Office be open on Friday, November 29 to receive delivery?

　　　　Answer: The District Office will be closed to the public and not accepting deliveries Monday through Friday (November 25, 2024 - November 29, 2024) for the Thanksgiving holiday. Thank you for bringing this to our attention. This Proposal Due date has been extended through **Wednesday, December 4, 2024 at 12:00pm** in an effort to avoid issues with delivering hard copies. Please see Addenda No. I for additional details. The Response Template coverpage has also been updated to reflect the date change. Please monitor the Ed Tech JPA website for future announcements regarding this RFP.

1.21　　**Question**: What districts are under this solicitation?

　　　　Answer: Irvine USD is the only district scoring this RFP, however once awarded any of the 183 Ed Tech JPA members may leverage agreements with awarded vendors at any point during the term of the Master Agreement between Ed Tech JPA and awarded vendors. If a member desires to leverage an agreement 1 - 2 years into the Master Agreement term they may do so, without running a separate RFP.

1.22　　**Question**: I absolutely would like to be a part of this but in my submission last year as a part of the "Security and IT Administration" RFP, I submitted [solution] for the section 3.6 Access and Control Management which includes Identity Management. For the below RFP, I would be submitting the same solution and am confused as to why there would be a request for RFP for a specific solution that was already covered during the previous years? Do I need to resubmit for this one or does what I submitted last year or would count towards this?

　　　　Answer: Sometimes RFPs have overlap in services, and there is not a need for vendors awarded for relevant sections to re-submit for a different RFP run so closely to the Security & IT Administration RFP. Ed Tech JPA plans to re-fun the Security & IT Administration RFP prior to the expiration of awarded contracts to avoid a lapse in available services.

Vendors who were awarded for the previous Identity Management RFP run in 2020 that were not awarded as a result of the Security & IT Administration RFP should submit new proposals due to the five year term limit imposed by Ed Code.