Request for Information No. VII
RFP No. 23/24-03 Security and IT Administration
December 7, 2023

Response to Proposers' Questions

7.1 **Question**: If price is dependent on how much data is being backed up how can Vendors reflect the differentiated pricing structures?

Answer: The Pricing Form is set up to allow for tiers and varied pricing. Vendors can lay out hypothetical pricing on the forms to help assist in clarifying pricing tiers. Vendors must be sure that proposed pricing is consistent (ie: examples match proposed pricing tiers). Pricing tiers may be based on district enrollment, quantities purchased or other criteria. Additionally, Ed Tech JPA understands that manufactures and distributors may have a variety of factors that could affect price at different times for prospective customers. To that end, equipment vendors may instead propose a minimum discount level off of Manufacturers' Suggested Retail Price (MSRP) for a specific product, product line or brand.

7.2 **Question**: If a Vendor doesn't structure pricing by student, and instead does it by device, etc how can that be reflected?

Answer: The Pricing Form allows Vendors to specify the product unit of measurement, and unit of threshold JPA Members must meet to receive the listed price. Screenshot of those sections on the Pricing Form below.

Unit Definition/Pricing Basis	Purchase Requirements (volume)
Describe what constitutes a unit. For example, if software is licensed based on student enrollment, Vendor might state (per student, based on total enrollment).	Indicate any threshold requirements (e.g., pricing tiers or minimum purchase amount) customers must meet to qualify for the pricing described in this line item (e.g., >30,000 studnets, minimum 20 units, purchases greater than $100,000).

There is space for hypotheticals on the Pricing Form. Vendors can also attach clarifying documentation for pricing.

7.3 **Question**: How does the 4% contract admin fee relate to additional subscriptions?

Answer: All purchases made under this contract are subject to the Administrative Fee, including new contracts, amendments/add-ons, and renewals.

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7.4   **Question**: What stops members from going to bid on their own, especially considering the Admin Fee and Minimum Price Guarantee?

Answer: Ed Tech JPA Members are free to run their own procurements. Ed Tech JPA was created in an effort to streamline procurement for Members and Vendors alike, but not to restrict anyone from running their own competitive procurements. A majority of members prefer to leverage a completed procurement and agreements, rather than duplicating the process.

If a Member becomes aware of a lower price they should notify Ed Tech JPA and Ed Tech JPA will reach out to the Vendor. The Minimum Price Guarantee is the expectation that Vendors provide the lowest available price to the Ed Tech JPA so there is not negotiation outside the JPA undercutting the pricing offered through the JPA. The intent of the Minimum Price Guarantee is to secure competitive pricing for our members, while participating Vendors experience reduced costs of procurement and contract negotiations with individual local education agencies.

The Minimum Price Guarantee does not apply to contracts and partnerships that were in effect prior to the Master Agreement between Ed Tech JPA and Vendors.

Ed Tech JPA also recognizes that some exceptions may be required for exceptionally large clients (such as LAUSD). If a vendor feels a lower price should be offered to a certain customer Ed Tech JPA would be open to discussing an exception to the Minimum Price Guarantee with that vendor.

Ed Tech JPA understands that the manufacturer, reseller and distributor relationships may also impact the Minimum Price Guarantee. Ed Tech JPA's goal is that the Ed Tech JPA Member is provided the best price available for the requested product from the awarded distributor/reseller. Sale prices and other incentives offered by the manufacturer that are customer-specific or limited-time offerings will not be considered violations of the Minimum Price Guarantee. Distributors/resellers may propose a minimum standard discount level for a product, product line, or brand name in the RFP pricing.

The intent of the Minimum Price Guarantee is to create a partnership with vendors. The goal to streamline procurement results in vendors responding to only one RFP, and negotiating one Master agreement with competitive pricing and terms that is compliant with privacy terms. Ed Tech JPA seeks to mutually benefit both members and vendors through consortium style procurement.

JPA is a public agency and cannot make a profit. The intent of the Administrative Fee is to assist Ed Tech JPA in covering operating costs, including the cost to advertise the RFP, as well as staff time and legal costs associated with the development, administration, and negotiation of the RFP and resulting contracts. The Administrative Fee is not intended to create a profit to Ed Tech JPA or any of its members. Ed Tech JPA has assumed significant operating costs, and hopes that in future years, as we continue to grow and have abated the start-up costs, the Board will be able to lower the Administrative Fee. Since its inception Ed Tech JPA has lowered the Administrative Fee for vendors with individual sales of three hundred thousand dollars ($300,000.00) and above as follows:

Individual Transaction Amount	Administrative Fee
Under $300,000.00	4%
$300,000.00 and above	3%

7.5   **Question**: If a Member receives lower pricing from a Vendor for a solution available through Ed Tech JPA, what is the process? What if the district/purchasing party is outside the JPA?

Answer: Members of Ed Tech JPA should notify the JPA if a Vendor offers a lower price for a solution available through Ed Tech JPA, unless the lower price is due to one of the exceptions listed in RFI No. 7.4. Ed Tech JPA will work with the Vendor to determine if the reduced pricing is an allowable exception to the Minimum Price Guarantee or if reduced/amended pricing for the JPA agreements are warranted. If amended pricing is warranted, Ed Tech JPA will reach out to the Vendor to amend the contract and to adjust pricing accordingly for all members. Typically when this happens a vendor has a different bundle of products available for a lower price and it is a simple process to update the Master Agreement. It is important for Vendors and Ed Tech JPA to work together, with a trusting relationship, to provide transparent agreements and pricing for Ed Tech JPA Members.

Pricing transparency is necessary for scoring, and allows Vendors and Participants to spend less time on contract and price negotiations and instead focus on implementation to ensure a successful adoption of the solution.

7.6   **Question**: Do Ed Tech JPA Members feel like they are getting the best price or do they feel like they should/can try to negotiate a better price?

Answer: Ed Tech JPA Members typically rest assured that the Minimum Price Guarantee ensures that the Pricing Form contains the lowest price available. Ed Tech JPA's board consists of CBOs, CTOs, and IT Directors. The Ed Tech JPA Board actively educates the K-12 community about the benefits of JPA agreements. Our Members generally prefer to leverage JPA agreements rather than pursue a separate bid. While reviewing proposals Ed Tech JPA asks Vendors Clarifying Questions to get clarity for the JPA's evaluation process and so those questions and answers are available for Members when they evaluate Vendors to determine which Vendor best meets their needs. We hope that this process allows both Vendors and Members to benefit from a streamlined process.

7.7   **Question**: Will you post the listed vendors that reply to the RFP?

Answer: Ed Tech JPA typically does not post a list of all Vendors who submit proposals, however an Intent to Award will be posted on the public RFP webpage prior to board award.

7.8   **Question**: Please describe any flexibility for resellers and distributors regarding the Administrative Fee.

   Answer: The Ed Tech JPA is a public agency that reviews and sets the administrative fee annually to cover the organization's costs (including managing the RFPs and contracts, advertising the RFPs, and legal and insurance costs). Our Board recognizes that the Security and IT Administration RFP invites varied proposals that may include complex partnerships with distributors, manufacturers and resellers. Ed Tech JPA is committed to applying a consistent and fair approach to the calculation of the Administrative Fee for all of our Vendor Partners. The Ed Tech JPA Board is open to further discussions on how administrative fees may apply to reseller/distributors and other situations unique to the scope of this RFP. Vendors may offer considerations related to the Administrative Fee in their Proposals in the Exceptions segment of the RFP response. Those considerations will be discussed during the clarifying questions, evaluation, and contract negotiations period following the deadline for submissions.

7.9   **Question**: May our company only submit for the specific categories we feel are a fit?

   Answer: All Vendors must respond to section 1 - Vendor Support & Ability to Perform, section 2 - Technology Requirements sections, and section 5 - Price.

Vendors may respond *only to applicable* sections in section 3 - Functionality and Usability - Security and section 4 - Functionality and Usability - IT Administration. Please refer to RFIs 1.6 and 1.14 and the RFP for additional information.

7.10   **Question**: If 7.9 is true, do we simply leave other areas blank? Or do you require at minimum a N/A response?

   Answer: Vendors may either leave sections blank or write N/A in the sections that they are not responding to. Vendors are not required to write "N/A" in sections they do not respond to to be considered responsive.

7.11   **Question**: May a large reseller partner submit on our behalf?

   Answer: Ed Tech JPA understands that both resellers and manufacturers may respond to this RFP. Please see RFI No.s 1.22, 1.23, 1.24, 1.26, and 7.8 for additional information.

7.12   **Question**: May we submit all of our qualifying products in 1 app response? Or do we need to complete a response for each product?

   Answer: Yes, Vendors may submit a single response including multiple solutions that meet the various criteria in the RFP. If offering multiple separate solutions please be clear in your proposal which solution meets each criteria. Suggested ways to submit are:
Option 1: Separate Proposals for each Solution
Option 2: Separate Functionality & Usability sections for products with combined Vendor Experience &

Ability to Perform and Technology sections

Option 3 (Preferred): Combined Proposal - Clarify which Solution the response references (responses may be broken down into different Solutions). If one proposed Solution meets the criteria but another does not, Vendors must be clear in their proposals regarding each Solution's capabilities.

Example:

**3.1.1 Describe how the Solution can establish and maintain an accurate, detailed, and up-to-date inventory of Enterprise assets with the potential to store or process data, to include: end-user devices (including portable and mobile), network devices, non-computing/IoT devices, and servers. For mobile end-user devices, describe how MDM type tools can support this process, where appropriate. **

Product 1 Name (MDM): *Our MDM solution provides management and inventory control for all mobile device platforms ….(description of features)*
Product 2 Name (Server Management Solutions): *Our team provides professional services for managing server security, scalability, and overall health …. (description of services)*

7.13   **Question**: If one of our products is approved, are we a qualified vendor and may members purchase our entire line (of related products)?

        Answer: Members may only leverage the Ed Tech JPA agreements to purchase awarded products from awarded Vendors, in accordance with public procurement laws. The RFP Response Template and Pricing form includes space available for Vendors to list related products that may not have been specifically called for in the RFP. If these additional products (or product lines) are listed in the RFP and the Vendor is awarded, agencies may purchase those additional related products. Additionally, if a new Solution or bundle of Solutions that is related to the awarded Solution becomes available after award please contact our team and we will work with Vendors to amend the Master Agreement. Please keep in mind that this only applies to Solutions the Vendor was awarded for (Ex: a Vendor awarded for section 3.3 Data Protection can add additional modules and product bundles related to data protection products, but cannot add products for section 4.1 Help Desk after award).

7.14   **Question**: Could we receive a Word Doc version of the overview "RFP No.23/24-03 Security and IT Administration" PDF?

        Answer: The Response Template provided on the RFP webpage is available as a Google Doc and Vendors may download it as a Word document prior to entering responses.

7.15   **Question**: Page 72 of the RFP provides a pricing table. Is it required that we use this exact format/table for our pricing, or can we submit using our own pricing table?

If required to use the RFP pricing table, can you provide an excel spreadsheet version of this table so we can more easily edit it?

Answer: The Pricing Table provided must be the submitted pricing. Vendors can also attach clarifying documentation for pricing.

The Pricing Form is provided along with the Response Template on the RFP webpage and is available as a Google Sheet. Vendors may download it as an Excel spreadsheet prior to entering responses.

7.16   **Question**: I would like to participate in the subject pre-proposal conference.

Answer: The Pre-Proposal Conference that was held on September 28, 2023 was held prior to the receipt of this RFP, however all questions and answers were transcribed and posted on the webpage as RFI No. I.

The second optional Q&A session held at the CITE Conference on November 29, 2023 at 8:00AM, was open to all vendors in attendance at the CITE conference and questions and answers are transcribed within this RFI No. VII. The slide deck is also attached to this RFI No. VII.

7.17   **Question**: A. Appendix A, page 90 states the following, please clarify the grounds for termination.

> **"TERM**
> The term of this MA (the "Term") shall commence on the Effective Date and shall expire after a period of five (5) years. The Agreement may be terminated by Ed Tech JPA or Vendor for convenience after three years by the giving of notice of at least thirty (30) days before the expiration of the (3) year term."

Our concern is verbiage that the agreement is subject to "Termination for convenience" that may mean Customers are expecting to be able to cancel services at any time without cause. Many of our manufacturers and partners require subscriptions based on a 1 to 3 year client commitment and do not allow for cancellations once the order is placed.

Would it be possible to update the clause to accommodate termination for reasons such as non-performance and that termination for the convenience section be amended or removed?

Answer: The Master Agreement is the agreement between Ed Tech JPA and Vendors. This clause would allow a Vendor or Ed Tech JPA to cancel the Master Agreement for convenience, but does not allow Members to cancel their Purchase Agreements for convenience. This clause was developed due to a desire for a five year agreement term while also allowing Vendors flexibility in case there is a major change in their product offerings or partnership strategies. Ed Tech JPA is happy to negotiate this clause after award.

Please refer to section 12 - Term and Termination of the Purchase Agreement (page 35) for standard language related to a Participant's ability to terminate the Purchase Agreement with Vendor.

Vendors who desire to negotiate agreements should mention their intent to negotiate in Section 5: Exceptions of their proposal. Award is made contingent upon successful contract negotiations, which typically commence after award. Ed Tech JPA does not require redlines prior to award.

7.18   **Question**: Are 3rd party vendor partnerships allowed?

Answer: Yes. Ed Tech JPA understands that both resellers and manufacturers may respond to this RFP. Please see RFI No.s 1.22, 1.23, 1.24, 1.26, 7.8, and 7.11 for additional information.

7.19   **Question**: You mention the following as factors in the decision process: Functionality and Usability, Vendor Support and Ability to Perform, Price, and Technology Requirements. How is each section weighted?

Answer: Ed Tech JPA scores based on a pass/fail basis. Please refer to RFI No. 1.6 and the RFP for additional information.

Ed Tech JPA Members have varied needs and may determine different weights for each section. For example Irvine USD plans to score each section for desired products as: Vendor Support and Ability to Perform - 20%, Technology Requirements - 25%, Functionality and Usability - 25%, Price - 30%.

7.20   **Question**: "**3.18.0 Describe how the Solution can support Participants to test…"

a. Are the Participants wanting to be able to run these tests themselves, or could this be a service that a vendor provides in a cadence or ad-hoc services and delivers the results to the Participant?

b. Penetration tests are generally scoped based on the number of devices in-scope for the engagement. Is there a baseline of how many internal and external devices should be used to compute pricing?

Answer:
a. Criteria no 3.18.0 states: "Describe how the Solution can support Participants to test the effectiveness and resiliency of Enterprise assets through identifying and exploiting weaknesses in controls (people, processes, and technology), and simulating the objectives and actions of an attacker".

Vendors may propose a solution that allows Participants to run tests or a service that Vendor provides to run tests and provide results to Participants. Vendors should be clear about the services and pricing offered.

b. Ed Tech JPA is aware that Vendors may have varied needs related to pricing tiers. Vendors may set their own tiers related to the number of devices that qualify for each pricing tier.

7.21   **Question**: 3.18.1 - Is Physical Security Controls to be tested in a clandestine red-team engagement or via a physical security walk-through?

        Answer: Criteria no 3.18.1   states: "Describe how the Solution can support Participants to establish and maintain a penetration testing program appropriate to the size, complexity, and maturity of the Enterprise. Please describe penetration testing program characteristics including scope, such as: network, web application, Application Programming Interface (API), hosted services, and physical premise controls; frequency; limitations, such as acceptable hours, and excluded attack types; point of contact information; remediation, such as how findings will be routed internally; and retrospective requirements".

Ed Tech JPA Members are diverse and have varied needs. Some of our members may be seeking tools for internal staff to leverage for pen testing. Other members may be looking for more comprehensive testing and remediation services from a Vendor Partner. Vendors should describe their available offerings in response to the RFP so that our Members may select the option that best meets their needs. Please clearly describe the proposed Solution(s) in the proposal so Members can make an informed decision when evaluating products.

7.22   **Question**: 3.18.1 - Please describe the physical characteristics of how many buildings, doors, floors, etc. as a baseline for responding.

        Answer: Ed Tech JPA Members are diverse and vary from very small single school districts to large districts with enrollment of up to approximately 140,000 students. Members will evaluate Proposals based on their specific needs, so please include a clear description of what your solution offers.   If pricing is determined by the quantity of buildings, doors, and/or floors Ed Tech JPA recommends including those as the Unit Definition/Pricing Basis.

7.23   **Question**: 3.18.2 - Please describe your definitions of clear and opaque box penetration testing.

        Answer: Criteria no. 3.18.2 states "3.18.2   Describe how the Solution can support Participants to perform periodic external penetration tests based on program requirements, no less than annually. External penetration testing must include Enterprise and environmental reconnaissance to detect exploitable information. Describe if the testing is clear box or opaque box".

The intent of this criteria is to provide a clear description of the Vendor's capabilities to support testing. Vendors should be clear about their offerings and expectations related to the style of testing they support/offer. For the purposes of this requirement, the terms "clear box" and "opaque box" refer to the amount of information the Vendor would expect to receive regarding information about the customer's network environment.   The specific terminology used (i.e.., clear = customer provides significant network and system information prior to testing, opaque = customer provides very limited information prior to testing) is not critical to the evaluation of the Proposal. Instead, the purpose behind

the question is to gather details about the preferred style of testing and the scope of testing the Vendor can perform.

7.24   **Question**: 3.18.3 - Remediation generally requires patch and configuration management within the environment. Is the organization wanting to acquire new solutions for this? Would it be preferable to manage it internally or would the Participant prefer to outsource the remediation activities?

     Answer: Criteria no. 3.18.3 states"Describe how the Solution can support Participants to remediate penetration test findings based on the Enterprise's policy for remediation scope and prioritization".

     Ed Tech JPA Members are diverse and vary from very small single school districts to large districts with enrollment of up to approximately 140,000 students. Members will evaluate Proposals based on their specific needs, so please include a clear description of what your solution offers. Some members may be seeking identification of vulnerabilities, whereas others may be seeking a full patch management solution.

7.25   **Question**: Please provide the following information to allow product selection and sizing of a Solution for all In-Scope Enterprise Assets for a single Participant (school district or education agency):

     a.   Identify the formal process Participants are required to use to identify "In-Scope Enterprise Assets" to be protected by the Solution.

     b.   Identify the process to be used by Participants to assign a minimum of three staff members to operate and maintain the Solution who shall be required to successfully complete Solution training

     c.   Identify the process to be used by Participants to identify Assets requiring segregation or other special handling as referenced in Requirement 3.11.3 of the RFP

     d.   Identify the process to be used by Participants to provide the following information required to determine the allow product selection and sizing of a Solution for all In-Scope Enterprise Assets

          d.1. Data retention requirements (backup versions or days of backup) required on-site, on removable media, or in the cloud

          d.2. Recovery Point (RPO) and Recovery Time (RTO) objectives in general

          d.3. RPO and RTO for any applications with different requirements

          d.4.   Expectations/requirements for backup windows during the work week and on weekends or holidays

d.5. Amount of data to be protected by the Solution

d.6. Annual growth rate of data expected

d.7. Number of years the Solution should be sized to protect the "In-Scope Enterprise Assets"

d.8. Virtualization environment(s) to be protected

d.9. Number of virtual servers and a list of all operating systems and applications virtualized

d.10. Number of host servers, Vendor and Version of virtualization software deployed

d.11. Vendor, Model, Capacity, and Firmware version(s) of all shared storage arrays.

d.12. Vendor, Model, Capacity, and firmware version(s) of all NAS arrays to be protected

d.13. All applications (Vendor and version) requiring application-level backup or recovery

d.14. Number of sites to be protected by one manager system

d.15. WAN connectivity and available bandwidth between remote sites and central core

d.16. Amount of Data, number of host and virtual servers broken down by site

d.17. Ethernet connectivity within each site (core speed, server link speeds to Top of Rack or core switches)

d.18. Type and speed of connectivity to storage

d.19. Type and configuration of any tape drive(s), autoloaders, or libraries to be used as targets

d.20. Internet connectivity including existence of Direct Connect configurations if expected used for replication

d.21. Number of users by cloud environment and a list of all cloud applications including SaaS solutions to be protected by the Solution

d.22. Amount and growth rate of Mainframe or AS/400 applications or data to be protected by the Solution

Answer: Ed Tech JPA Members are diverse and vary from very small single school districts to large districts with enrollment of up to approximately 140,000 students. Members will evaluate Proposals based on their specific needs, so please include a clear description of what your solution offers.

7.26   **Question**: Disclaimers:

      1. Backing up applications, operating systems, or virtualization versions which are no longer supported by the original vendor (beyond End of Support Life or End of Security Support) may not be possible.

      2. Any software or storage hardware to be protected should be under current manufacturer technical support.

      Answer: Vendors may include disclaimers in their proposals and/or Purchase Agreements.

7.27   **Question**: Can a distributor submit a proposal? Or should it be only the manufacturer and/or reseller submitting the proposal?

      Answer: Yes, distributors may submit proposals in response to this RFP.

7.28   **Question**: I understand our attorney submitted a follow-up email with suggested edits/red-lined to the RFP (https://edtechjpa.org/rfp-no-2324-03-security-and-it-administration) and I am checking in to see if those have been reviewed by your team? The concern is mainly under the indemnification section, as we cannot accept unlimited liability. We would like to respond to the RFP as we feel [vendor name] will have a great impact in protecting CA students and we are hopeful these edits can be made.

      Answer: Ed Tech JPA has not received redlines related to this RFP, however the JPA understands that contract negotiations are part of the process prior to finalizing agreements. Vendors who desire to negotiate agreements should mention their intent to negotiate in Section 5: Exceptions of their proposal. Award is made contingent upon successful contract negotiations, which typically commence after award. Ed Tech JPA does not require redlines prior to award.

7.29   **Question**: On the data protection section, are we referencing the primary copy of data or a secondary backup copy of data for the questions being asked in both the green and blue sections?

      Answer: Ed Tech JPA Members are diverse and vary from very small single school districts to large districts with enrollment of up to approximately 140,000 students. Members may have needs for managing both the primary copy and secondary backup copy of their data. Members will evaluate Proposals based on their specific needs, so please include a clear description of what your solution offers.

7.30   **Question**: Are we looking for a backup solution or a data management solution?

      Answer: Both types of solutions could be responsive to the requirements of this section. Ed Tech JPA Members are diverse and vary from very small single school districts to large districts with

enrollment of up to approximately 140,000 students. Members will evaluate Proposals based on their specific needs, so please include a clear description of what your solution offers.

7.31   **Question**: If a reseller makes the contract for one category and begins working with a school district, but then through conversations with the end user, realize that another product/solution could also benefit the client, and it is for a product not offered through JPA, can the end user still work with that reseller for that product or would that then need to go to bid?

        Answer: Members may only leverage the Ed Tech JPA agreements to purchase awarded products from awarded Vendors, in accordance with public procurement laws. If a Member desires to purchase products not part of the awarded Master Agreement they would need to use a different procurement vehicle.

         If a Vendor has a new Solution or bundle of Solutions that is related to the awarded Solution that becomes available after award they may work with Ed Tech JPA to amend the Master Agreement. This only applies to Solutions the Vendor was awarded for (Ex: a Vendor awarded for section 3.3 Data Protection can add additional modules and product bundles related to data protection products, but cannot add products for section 4.1 Help Desk after award).

        This RFP has been designed to encompass a large variety of security and IT administrative products in an effort to provide a broad purchasing vehicle.

7.32   **Question**: Are you considering edits to your agreement?

        Answer: Ed Tech JPA understands that contract negotiations are part of the process prior to finalizing agreements. Vendors who desire to negotiate agreements should mention their intent to negotiate in Section 5: Exceptions of their proposal. Award is made contingent upon successful contract negotiations, which typically commence after award. Ed Tech JPA does not require redlines prior to award.

7.33   **Question:** The JPA RFP requests references, and given you are a current customer and [vendor name] user, may we list the district (IUSD) as a reference?

        Answer: Yes, Ed Tech JPA has many members and members that are using the proposed solution are considered valid references.

7.34   **Question:** Do you know when responses [from previous RFIs/vendor conferences] will be released?

Would it be possible to request an extension in order to allow Vendors time to formulate the appropriate responses once they are released?

      Answer: All RFIs received by December 7, 2023 are included in this RFI or previously posted RFIs. Due to increased interest in this procurement the deadline for proposals will be extended through January 11, 2024 at 3:00pm. Please reference Addenda No. II for additional details.

Ed Tech JPA

Edtechjpa.org

Why is technology purchasing so challenging?

Large LEAs

Everything is an RFP

Every RFP takes **6 months**

Smaller LEAs

Limited resources (IT and Legal)

Difficult contract **negotiations**

Higher costs per student

Vendors

100+ Page Responses to RFPs

Rigid Selection Processes

Costly contract negotiations

Long delays between leads and sales

Who we are

Our Board

Jeremy Davis, Fullerton Unified

Brianne Ford, Irvine Unified

Kelly Hilton, San Ramon Valley Unified

Michael Johnston, Clovis Unified

Sean Rozell, Capistrano Unified

David Seabury, El Dorado COE

Peter Skibitzki, San Juan Unified

Our Team

Mark Williams, F3

Michelle Bennett, IUSD

Susan Rutledge, CUSD

Larry Corum, CUSD

Tatum Toste, CUSD

Francie Heim, Retired CBO

Bill McGuire, Retired CBO

**EDUCATION TECHNOLOGY**
JOINT POWERS AUTHORITY

Core Values

- **Community** - We believe that joining together as public agencies with a focus on common goals is a powerful way to support each other.

- **Access** - We believe that streamlined procurement processes and choice allows public agencies to select solutions that best meet their needs.

- **Equity**- We believe that all public agencies should have access to high quality technology at the lowest cost.

- **Trust** - We act responsibly to advance public interests, safeguard student privacy and upholding public procurement laws.

Our Members… So Far

160 Members
Representing over 2 million Students in 35 CA Counties and 4 States

Our strength is in our membership. As we grow, so does our ability to procure and negotiate the best pricing and terms for our members. **Membership is FREE.**
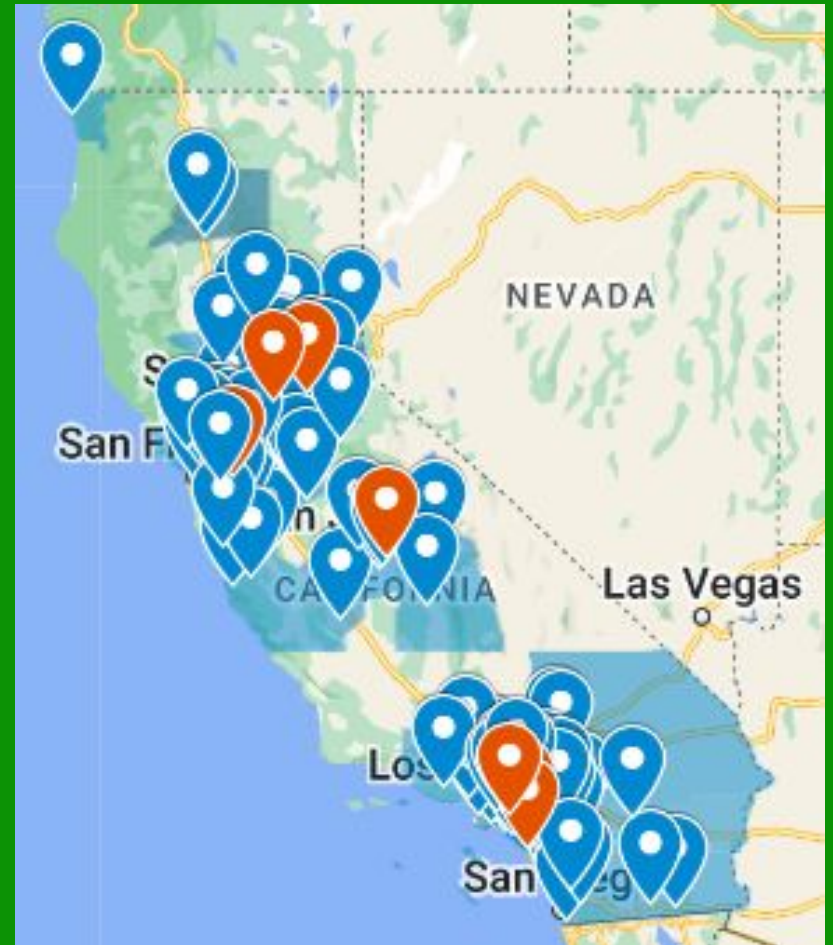
What is the Ed Tech JPA?

Educational agencies joined together
to do what we can't do alone.

- Consortium RFPs
- Multiple Awards
- Competitive Pricing
- Privacy-Compliant Contracts

Member Benefits

Streamlined Purchasing

Consortium Pricing

Comprehensive Legal Review

Privacy Compliance

It's FREE

Vendor Benefits

One RFP Response

One Master Agreement

Negotiated Purchase Agreement

Competitive Advantage

Increased Exposure

Expedited Sales and Contracts

Our Process

1. Identify high-need contracts.
2. Gather input and draft requirements.
3. Publish RFP in compliance with public contracts code.
4. Evaluate responses.
5. Make an award to qualifying vendor(s).
6. Negotiate contracts and secure the CA-NDPA.
7. Share contracts with Members.

Ed Tech JPA Contracts

3-Part Agreement

Master Agreement, Purchase Agreement, CA-NDPA

Minimum Price Guarantee

4% Max Administrative Fee (vendors pay)

Member Purchasing Process

1. Review Available JPA Contracts
2. Select a Product
3. Follow your district procedures for contract approval.

NO Contract Negotiations or RFP Required

Current Contracts

What can I buy now?

https://edtechjpa.org/services/jpa-contracts

- Assessment Platforms
- Classroom Management and Student Online Safety Systems
- College and Career Planning Systems
- Educational Intelligence and Analytics
- Electronic Document Routing Solutions
- English Language Learner Management
- Facilities and Resource Management
- Human Resources & Substitute Management
- Identity Management Solutions
- Learning Management Systems
- Media Repository Solutions
- Mobile Device Management
- Notification System Platforms
- Nutrition Management Platforms
- Professional Learning Management Systems
- Social and Emotional Learning Assessment Systems
- Student Information Systems
- Web Design and Hosting

Coming Soon: Re-issuance of previously run RFPs to account for five year contract term limit imposed by Ed Code

Current Procurements

- **Assessment & Analytics**
  Award anticipated late January 2024

- **Electronic Document Routing**
  Award anticipated late February 2024

- **Security & IT Administration**
  Award anticipated late February 2024

Security and IT Administration RFP

Proposals Due December 14

How do you create an RFP when the problems are shared, but the possibilities for solutions are limitless?

Create an RFP…

- Focused on goals (not product)

- Flexible enough for equipment, software, and services

- Structured for multiple offerings and multiple awards

- Supportive of a more comprehensive approach to security and IT administration
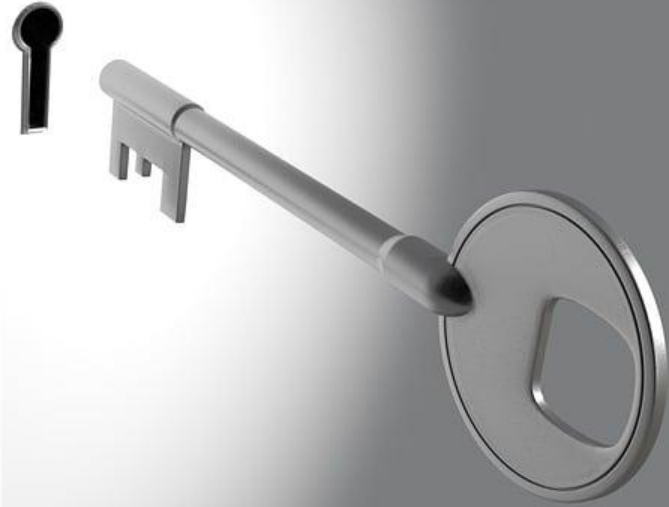
RFP Overview

- Vendor Support & Ability to Perform

- Technology Requirements

- **Functionality & Usability**
-Respond only to applicable sections-

- Price

RFP Overview

Functionality and Usability

-Respond only to applicable sections-

Sections	Focus Area
3.1-3.18	Security: CIS Controls
3.19	Security: Services
3.20	Security: Campus Safety
4.1	Help Desk
4.2	Project Management
4.3	Student Safety/Classroom Mgt

Sections 3.1 through 3.18 of this RFP were adapted with permission from version 8 of the CIS Controls developed by the Center for Internet Security (cisecurity.org).

Evaluation/Award

- Ed Tech JPA may make multiple awards for each RFP (and/or sections within the RFP) to meet the needs of our diverse members.
- We award based on:
  - RFP Criteria: Vendors must meet the essential criteria listed in the RFP
  - Price: Vendors must provide competitive and transparent pricing.
  - Submission Requirements: Vendors must follow the instructions in the RFP for submission of proposals and complete all required forms.
  - Contract Requirements: Vendors and Ed Tech JPA must successfully negotiate contract terms (including CA-NDPA where applicable).

3.1 Inventory and Control of Enterprise Assets

Proposed Solution Name	Line Number(s) *From Pricing Form*	Page Number(s) *Reference Material*

3.1.0 Describe how the Solution can **actively manage (inventory, track, and correct) Enterprise assets (end-user devices, including portable and mobile; network devices; non-computing/Internet of Things (IoT) devices; and servers) connected to the infrastructure physically, virtually, remotely, and those within cloud environments, to support Participant in accurately knowing the totality of assets that need to be monitored and protected within the Enterprise. Please be sure to include how the Solution also supports identifying unauthorized and unmanaged assets to remove or remediate. **

3.1.1 Describe how the Solution can establish and maintain an accurate, detailed, and up-to-date **inventory of Enterprise assets with the potential to store or process data, to include: end-user devices (including portable and mobile), network devices, non-computing/IoT devices, and servers. For mobile end-user devices, describe how MDM type tools can support this process, where appropriate. **

3.1.1.1 Describe how the Solution can ensure the inventory records the network address (if static), hardware address, machine name, Enterprise asset owner, department for each asset, and whether the asset has been approved to connect to the network.

Required & Informational Criteria

- **Green** - Required for award

- Blue - Additional criteria used by Members when selecting products and services

Multiple Products Proposed

Option 1: Separate Proposals

Option 2: Separate Functionality & Usability sections for products with combined Vendor Experience & Ability to Perform and Technology sections

Option 3: Combined Proposal - Clarify which solution the response references (responses may be broken down into different Solutions). If one proposed Solution meets the criteria but another does not, Vendors must be clear in their proposals regarding each Solution's capabilities.

Example:

3.1.1 Describe how the Solution can establish and maintain an accurate, detailed, and up-to-date **inventory of Enterprise assets with the potential to store or process data, to include: end-user devices (including portable and mobile), network devices, non-computing/IoT devices, and servers. For mobile end-user devices, describe how MDM type tools can support this process, where appropriate. **

Product 1 Name (MDM): *Our MDM solution provides management and inventory control for all mobile device platforms ….(description of features)*

Product 2 Name (Server Management Solutions): *Our team provides professional services for managing server security, scalability, and overall health …. (description of services)*

Sample Award Structure

Vendor	CIS Controls																				IT Administration		
	3.1	3.2	3.3	3.4	3.5	3.6	3.7	3.8	3.9	3.10	3.11	3.12	3.13	3.14	3.15	3.16	3.17	3.18	3.19	3.20	4.1 Help Desk	4.2 Project Mgmt	4.3 Classroom Mgmt
Vendor A	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No	No	No	No	No	No	No	No	No	No	No	No	No	No
Vendor B	No	No	No	No	No	No	No	No	No	No	No	No	No	No	No	No	No	No	No	No	No	No	Yes
Vendor C	No	No	No	No	No	No	No	No	No	No	Yes	No	No	No	No	No	No	No	No	No	No	No	No

Award Process

Time	Event
Sept 15	RFP Posted
Dec 14	Proposals Due
Dec-Feb	Preliminary Review Clarifying Questions Final Review and Scoring
Feb-Mar	Award and Negotiations
Mar …	Contracts Available: ● Master Agreement ● Purchase Agreement* ● CA-NDPA *Vendor/product-specific terms may be incorporated

After Award

- Ed Tech JPA communicates awards/availability of agreements to members.
- Contracts available for up to 5 years
- Members (current and future) can leverage the contracts at any point during the term without needing a separate RFP or contract negotiations.
- Vendors may advertise the available agreements and refer potential members to Ed Tech JPA for support with the membership and contracting process.

Admin Fee Structure

Individual Transaction Amount	Administrative Fee
Under $300,000.00	4%
$300,000.00 and above	3%

- Paid on a quarterly basis by vendors.
- Admin Fees are <u>not paid by members</u>, and the Admin Fee cost is not added to the vendor's fees.
- Admin Fees are used to pay the JPA's operating costs: legal fees, RFP advertising requirements, auditing and insurance costs.

Security & IT Administration Upcoming Dates

Last day to submit RFIs	**12/5/23 12:00pm** edtechjpa@iusd.org
RFI Responses Posted	12/8/23
Proposals Due	12/14/23 4:00pm
Intent to Award Posted	Anticipated 2/21/24
Board Award	Anticipated 2/29/24

Additional Award Dates may be added later depending on response volume
All time are pacific time
All dates subject to change

Questions?

https://edtechjpa.org

edtechjpa@iusd.org

What's Next?

https://edtechjpa.org

edtechjpa@iusd.org

Public Agencies

1. Review our website for procurements, contracts, and our current members

2. Contact edtechjpa@iusd.org to receive our monthly newsletter.

3. **Become a JPA Member**

Membership Process

(1) Go to
https://edtechjpa.org/members/becoming-member

(2) Board Approval (if needed)

(2) Signed Member Agreement

(3) Online Membership Application

Vendor Partners

(1) Check out upcoming RFPs on our website.

(2) Contact edtechjpa@iusd.org to be added to our notification list.

(3) Respond to an RFP.

Security and IT Administration:
RFI Deadline - Dec 5
Proposal Deadline - Dec 14

Thank You!

https://edtechjpa.org
edtechjpa@iusd.org

Exhibit Hall - not for profit area