

Request for Information No. II
RFP No. 20/21-01 Identity Management Solution
September 25, 2020

Response to Proposers' Questions

2.1 **Question:** How should Vendors submit proposals if they have multiple provisioning choices that may be suitable for different sized districts.

Answer: Vendors may submit multiple responses to the RFP. If Vendors offer two entirely distinct solutions that meet different functional requirements, Ed Tech JPA recommends that they submit two separate proposals (often sections 1 and 2 are similar but section 3, 4 and the pricing forms are significantly different).

If Vendor has a single product line, with multiple modules or configuration options, Ed Tech JPA recommends that Vendors submit one proposal with the modules/options clearly defines the differences. Vendors must be clear about which criteria in the RFP is met by each suite. Where no specific suite is referenced it will be assumed that the proposed base package on the pricing form meets requirements.

Add on and optional features or services, may be included in the Optional Services section of the Pricing Form.

2.2 **Question:** How can Vendors submit pricing for different numbers of users? Would they submit at chart?

Answer: Tiered pricing is included in the RFP to allow Vendors to adjust price based on the scale of contract to allow economies of scale to be incorporated into proposals. Vendors may expand the pricing tables to allow for additional tiers. Ed Tech JPA understands that prices vary based on contract size, for example the price per student may be different for a contract with 10,000 students vs the price for a contract with 200,000 students. Vendors can also include different levels of implementation in the one-time pricing form in Appendix C, if applicable.

2.3 **Question:** Should Vendors estimate that they will work with two or more source systems (ie: staff & student) provisioning.?

Answer: Vendors should clarify if the number of source systems impacts pricing or other aspects of the RFP. Some JPA members may source data based on separate human resources and student systems. Other JPA members may have a single source system with staff in the same database as students. If pricing is affected by the number of sources Vendors may include details in tiered pricing (ex: Tier 1 = 1 source and under 10,000 staff and students. Tier 2 = 2 sources and under 10,000 staff and students, Tier = 1 source and over 10,000 staff and students, Tier 4 = 2 sources and over 10,000 staff and students). Vendors may also include additional costs for more than one source as an hourly rate (\$/hour) or package rate for additional services (\$/each additional source).

2.4 **Question:** What do the blue and green sections in the RFP mean?

Answer: Green sections are required to meet minimum requirements (also noted with double asterisk). Vendors who meet all essential requirements (green, double asterisks) and agree to terms and conditions will be considered for award. Blue sections are not required criteria and allow Vendors to differentiate their solutions and allow members to make an informed decision about what Solution best meets their unique needs. Ed Tech JPA members vary in size from 1,500 ADA to 600,000 ADA, and have different needs.

Additionally, all Vendors must respond to essential requirements in Sections 3.1 - 3.5. Essential requirements for sections 3.1 - 3.5 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 section 3.5 they will be awarded for sections 3.1 - 3.4. Below is an example of a possible awards scenario.

Vendor	3.1 General	3.2 Account Lifecycle Management	3.3 Password Management and 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	Yes	Yes	No	No

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.

Ed Tech JPA's Identity Management 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.

2.5 **Question:** Section 1.11.1 of the RFP mentions that Vendors must have five K-12 or government references. What if a Vendor does not have five K-12 references?

Answer: Section 1.11.1 requires five K-12 or government agencies that currently use the proposed solution. If the proposed Solution is in transition from a legacy product for private entities to a Solution available to public agencies Vendors may submit references that are not K-12 or government agencies for the current product and K-12 references with a similar solution. Vendors should clearly

state how the referenced solution, if not the proposed products, is similar to the proposed products. The Ed Tech JPA evaluation committee will review submitted references and make a decision based on vendor experience and confidence regarding Vendor's ability to meet essential criteria and other RFP requirements. An addendum shall be issued to clarify this issue.

2.6 **Question:** Is the goal to make a single award or select multiple vendors that Ed Tech JPA members throughout California can select?

Answer: The JPA may make one or more awards to qualified vendors. Vendors who meet all essential requirements and comply with all of the terms of the RFP are likely to be awarded. JPA Members may then select the product from the awarded vendors that best meets their needs.

2.7 **Question:** Is there a breakdown of how the Ed Tech JPA evaluation committee will make decision?

Answer: Ed Tech JPA scoring is based on a pass/fail basis. Ed Tech JPA's Identity Management 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. Ed Tech JPA members then score awarded vendors based on their requirements to determine which Vendor is the best fit for their needs.

2.8 **Question:** Is there a preference between on-prem or software-as-a-service (saas) solutions?

Answer: Ed Tech JPA does not have a preference for either on-prem or saas solutions. Ed Tech JPA members are diverse and may have individual preferences. Typically Vendors who offer both on-prem and saas solutions will include both in their proposals and include different pricing for each Solution. If on-prem and saas solutions have different functionality it is best to submit two proposals (please see RFI no. 2.1 for additional information regarding multiple proposal submissions).

2.9 **Question:** Is there a standard number of applications for each Ed Tech JPA member?

Answer: The number of applications that each Ed Tech JPA member plans to integrate with the Solution may vary. Some Ed Tech JPA members may want a full Single-Sign-On (SSO) application (with a large number of applications) and others may plan on using the system only to administer accounts in their primary authentication platforms (e.g., Active Directory, G-Suite, Open Directory).

IUSD plans to use the Solution primarily for account management in Active Directory and G-Suite. IUSD uses Active Directory and G-Suite for authentication to other programs and assigning permissions based on group/OU membership (this is a common setup for school districts, however Ed Tech JPA members may have different setups).

Ed Tech JPA recommends proposing a base level package and pricing based and clearly specifying how many source and destination systems are included in that package. We further recommend including add-on packages for additional integrations that are priced by system or with a

proposed hourly rate for the services so that the Vendor and Ed Tech JPA Members can scale the solution to meet their needs.

2.10 **Question:** Can Vendors submit two proposals?

Answer: Yes. Vendors may submit two proposals if the vendor is offering two distinct solutions for Identity Management.

2.11 **Question:** Will Proposals be made public or kept within JPA?

Answer: Ed Tech JPA does not post proposals publicly. Awarded Vendor Proposals will be posted on a password-protected members-only website and available only to JPA members. Please note that all proposals are subject to the California Public Records Act (when Ed Tech JPA receives a public records request we contact affected vendors to allow an opportunity for vendors to redact trade secret information prior to Ed Tech JPA's response to the public records request).

2.12 **Question:** Please provide information about if this is a system you already have in place or if it is a new initiative. If it is a current system please divulge the current provider.

Answer: The Ed Tech JPA RFP is a new initiative due to demands by Ed TEch JPA members. Each JPA member will be in a unique situation with varied needs.

IUSD currently uses Rapid Identity, which has been in use for five years. IUSD's current setup has met the majority of the district needs. IUSD hopes to find a solution that allows for more flexibility for staff with multiple assignments with differing permissions (ex: one individual who is both an instructional aid at one site and a teacher at a different site). IUSD is open to looking at new solutions and to looking at its setup with its current vendor, depending on what solution best fits district needs.

2.13 **Question:** Would districts other than IUSD purchase on the same timeline?

Answer: Not necessarily. Several Ed Tech JPA members are currently interested in an identity management solution. Other members may have a need in the near future. Ed Tech JPA members can purchase from an awarded vendor at any time during the contract term. For example an Ed Tech JPA member could make a purchase next year based on a contract established this year. The goal of the Ed Tech JPA award is to allow vendors to respond to a single RFP that can allow for a number of contracts with different agencies over the life of the RFP. Use of the contract can continue to grow throughout the term.

2.14 **Question:** Does this RFP include ongoing support as part of proposal, or just implementation?

Answer: This RFP includes ongoing support. Typically Vendors include implementation (ie: development, integration, training) in the One-Time-Costs Form; and ongoing support in the Annual-Recurring-Costs Form. Vendors should complete pricing forms based on their support model whether that is a flat one-time cost or annual cost for upgrades, hourly rate for custom development, or

different setup. The expectation is that each Ed Tech JPA member who is interested in purchasing the Solution will obtain a quote from Vendors specific to their needs that is consistent with JPA pricing (ex: Member 1 may need 1 hour of custom development and Member 2 may need 20 hours, etc)

2.15 **Question:** Please provide a breakdown of IUSD user account, employees, and staff.

Answer: IUSD currently has approximately 36,500 students and 4,500 staff (including 1,950 certificated staff) .

2.16 **Question:** Is there a need to include additional users such as vendors and contractors in the solution?

Answer: Some Ed Tech JPA members may have a need for additional users (such as vendors, contractors, community members, and consultants) to be included in the Solution.

IUSD does not require additional users for outside vendors and contractors. IUSD currently uses its human resources system to track non-employees and to distinguish them from employees.

2.17 **Question:** Please clarify what data Vendors should include in Exhibit B of the California Student Data Privacy Agreement. Typically access to data is determined by the customer and vendors do not want to give a false sense of access to potential customers.

Answer: It is typically best to check all data that it is possible for the Solution to access if a customer were to grant access. Vendors may note that the Solution is capable of housing data only if access is granted by the Ed Tech JPA member.