

**IRVING INDEPENDENT SCHOOL DISTRICT
PURCHASING DEPARTMENT**

2621 West Airport Freeway IRVING, TX 75062
PHONE: (972) 215-5440 FAX: (972) 215-5442

This is NOT AN ORDER. It is an invitation to bid or propose.

**Request for Competitive Sealed Proposals
CSP #09-43 Identity Management Solution Services**

Please RESPOND on the following not later than **11:00 AM, July 14, 2009.**

SUBMIT ONE ORIGINAL AND TWO COPIES OF BID.

Mark **sealed envelope** CSP #09-43 Identity Management Solution.

This proposal will open at **11:00 AM, July 14, 2009** and deliver to the Purchasing Office address at the top of this form or mail to:

MAIL TO:
Rick Powell, Director of Purchasing
Irving ISD
P.O. Box 152637
Irving, TX 75015-2637

OR DELIVER TO:
2621 West Airport Freeway
Irving, TX 75062

Any submissions of information or documents to Irving ISD (District) pursuant to this bid or proposal is deemed public information by the District unless the Director of Purchasing of the District is otherwise noticed in writing and responds to vendor in writing receiving said notice. In determining the award of contracts, the District shall consider factors in accordance with Section 44 Texas Education Code. The right is reserved to accept or reject each item separately or as a whole.

Any reference within the following pages of this document to bid, Request for Proposal (RFP), Competitive Sealed Proposal (CSP) are used interchangeably as the legal method of procurement listed at the top of this page one of the document. It is the responsibility of the vendor to monitor the Irving ISD's website at <http://www.irvingisd.net/purchasing/bids.htm> for any addenda to the RFP.

IRVING INDEPENDENT SCHOOL DISTRICT

By: 

Richard Powell, Director of Purchasing
rpowell@irvingisd.net

You are representing to Irving ISD that you are authorized to submit this proposal by signing below.

Proposal submitted: (Circle one) YES OR NO BID

Company Name: _____

Signature of authorized representative _____ Date _____

Printed name _____ Email _____

Phone () _____ Fax () _____

Vendors shall not discriminate against any employee or applicant for employment because of race, religion, color, sex, or national origin. Bidder certifies that the company complies with Executive Order 11246, entitled "Equal Employment Opportunity", as amended by Executive Order 11375 and as supplemented in Department of Labor Regulations.

CENTENNIAL
1909-2009



Request for Proposals

for Identity Management Solutions

CSP 09-43

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2 Introduction

2.1 Intent

The intent of this RFP is to solicit competitive, sealed, proposals for the purchase of an Identity Management Solution that will support the goals and meet the needs of the Irving Independent School District.

2.2 Background

Currently, the Irving Independent School District (Irving ISD) has a manual process for provisioning resources to new employees and ensuring employees only have access to systems they need. The school district has approximately 4000 employees across 125 departments.

2.2.1 Current Process

When a new employee is hired, they must initiate contact with the help desk assigned to their department. At that point the help desk responsible for their department will create an Active Directory account for them, an Exchange mailbox, and a home drive. The new hire will then be added to some department-specific security and distribution groups, some role-specific distribution and security groups, and some security and distribution groups specific to department and role. The help desk is not always aware what groups the new hire should be in. This can cause some new hires to go months without access or important communications.

The user is not typically removed from groups when they change roles or departments until the person taking their place requests an account and sometimes not at all if they are not being replaced or it is not clear who their replacement is. In some cases the employee might have a completely new account, mailbox, and home drive created for them when they move to a new department.

Because the help desk for each department is not notified which employees are simply moving within the district and which are leaving the district, accounts are rarely disabled or deleted for employees.

Irving ISD also has many applications that can leverage Active Directory for authentication.

Unfortunately, we cannot take advantage of this because we are unable to tie an Active Directory account back to a specific employee in these systems.

2.2.2 Goals

Irving ISD is looking to implement an Identity Management Solution that will automate this process in order to meet the goals:

- Reduce time it takes for employees to get added to the correct distribution and security groups
- Reduce account proliferation by leveraging Active Directory/LDAP authentication in systems where it is available

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- Reduce help desk costs associated with forgotten usernames and passwords.
- Increase communication between departments about role changes and department changes through automated notifications
- Increase security across all systems by enforcing stronger passwords
- Increase security by ensuring access to revoked when it is no longer appropriate
- Reduce time to fulfill requests from auditors about who has access to what and when they had that access.

The Irving ISD technology support staff is comfortable with Microsoft technologies and is looking for an Identity Management Solution that will allow us to leverage our current skills and experience in managing and maintaining applications built on top of Microsoft's products.

3 Vendor

The selected vendor will be skilled and regularly engaged in providing similar solutions in the marketplace. Vendors must demonstrate the ability and capacity to install and implement the system being proposed and demonstrate experience providing such a solution. Vendors must have all resources available to successfully execute the proposed solution at the time a proposal is chosen. These resources include but are not limited to, fully functional software and fully staffed personnel units possessing the required skills. Vendors must have strong references to support their ability to provide the proposed solution within the timeframe proposed.

3.1 Vendor Background Information

The vendor will provide the following information:

- 1) Official company name, company address, Federal ID #, phone number and link to website
- 2) Contact name and contact information of company project manager
- 3) Brief description of the company and the services that it provides
- 4) A brief history of the company, including how long the company has been providing similar services
- 5) A description of the team that will be involved with delivering the solution, including:
 - a) Length of time that they have been employed by the vendor
 - b) Brief description of their experience with the vendor
 - c) Relevant technical skills and abilities
 - d) Planned responsibilities on this project

3.2 Vendor Experience and References

The vendor will provide an overview of all experience successfully providing solutions of similar size and for work that is substantially similar to the work that is described in this response. The vendor will also provide the following information:

- 1) Whether the vendor has failed to complete any work awarded in the last 5 years

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- 2) Three (3) reference letters from existing clientele. For each reference the vendor will provide the following information:
 - a) Name of Client
 - b) Whether the client is in the public sector or private sector
 - c) Contact information including: Contact name, title, phone number, fax number, and e-mail
 - d) The client's address
 - e) Number of identities managed
 - f) A description of how the work you did for the client is similar to this proposal

3.3 Product History

The vendor's response should include a brief history of the products proposed. They should also include the number of product updates released for each proposed product in the past year. If applicable, please categorize the number of updates by into the following categories: critical updates, security updates, important updates, recommended updates.

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4 Requirements

4.1 Functional Specifications

For each specification, the vendor should indicate that the proposed solution meets the specification with a single check in the “Meets” column. Please use the “Details” column to provide any additional information.

1.0	Provisioning	Meets	Details
1.1	The proposed solution should automatically create accounts in Active Directory for new employees.	<input type="checkbox"/>	
1.2	The proposed solution should automatically create an Exchange 2007 mailbox for new employees.	<input type="checkbox"/>	
1.3	The proposed solution should automatically create a home drive on a Windows file server for new employees.	<input type="checkbox"/>	
1.4	The proposed solution must allow custom account name generation in Active Directory.	<input type="checkbox"/>	
1.5	The proposed solution must allow custom SMTP email address generation in Exchange 2007.	<input type="checkbox"/>	
1.6	The proposed solution should place Active Directory accounts in a specified Organizational Unit (OU) based on department and role.	<input type="checkbox"/>	

1.0	Provisioning	Meets	Details
1.7	The proposed solution should place Exchange 2007 mailboxes on the specified server and in the specified storage group based on department.	<input type="checkbox"/>	
1.8	The proposed solution should place home drives on the specified Windows file server based on department.	<input type="checkbox"/>	
1.9	The proposed solution should be able to read employee data from delimited text files.	<input type="checkbox"/>	
1.10	The proposed solution should be able to place Active Directory accounts in specified Security Groups based on department, role, or department and role.	<input type="checkbox"/>	
1.11	The proposed solution should be able to place Active Directory accounts in specified Distribution Groups based on department, role, or department and role.	<input type="checkbox"/>	
1.12	The proposed solution should be able to move accounts in Active Directory to a specified OU when their role or department changes	<input type="checkbox"/>	

1.0	Provisioning	Meets	Details
1.13	The proposed solution should be able to remove Active Directory accounts from specified Security Groups when they are no longer in a department, role, or department and role.	<input type="checkbox"/>	
1.14	The proposed solution should be able to remove Active Directory accounts from specified Distribution Groups when they are no longer in a department, role, or department and role.	<input type="checkbox"/>	
1.15	The proposed solution should be able to disable accounts after an employee has been gone from the district for a specified period of time.	<input type="checkbox"/>	
1.16	The proposed solution should make it possible to temporarily revoke or disable an account in Active Directory.	<input type="checkbox"/>	
1.17	The proposed solution may provide recovery of deleted Active Directory accounts and Exchange 2007 mailboxes.	<input type="checkbox"/>	
1.18	The proposed solution must provide a portal for delegated administration of Active Directory and Exchange 2007 objects.	<input type="checkbox"/>	
1.19	The proposed solution must provide a way to manually provision identities through and administrative portal.	<input type="checkbox"/>	

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1.0	Provisioning	Meets	Details
1.20	The proposed solution must provide a mechanism for generating alerts based on role or department changes.	<input type="checkbox"/>	
2.0	Self-Service	Meets	Details
2.1	The proposed solution should allow users to reset their password and unlock their own Active Directory account.	<input type="checkbox"/>	
2.2	The proposed solution should allow users to reach the self-service application from the Windows login screen for: Windows XP SP3 (x86 and x64), Windows Vista SP1 (x86 and x64), Windows Server 2003 (x86 and x64), Windows Server 2008 SP1 (x86 and x64)	<input type="checkbox"/>	
2.3	The proposed solution should allow users to reach the self-service application through a web site.	<input type="checkbox"/>	
2.4	The proposed solution should allow for password complexity policies.	<input type="checkbox"/>	
2.5	The proposed solution should provide password synchronization capabilities for Active Directory.	<input type="checkbox"/>	

3.0	Workflow	Meets	Details
3.1	The proposed solution must incorporate a workflow engine for provisioning.	<input type="checkbox"/>	
3.2	The proposed solution must allow configurable workflow forms.	<input type="checkbox"/>	
3.3	The proposed solution must include a WYSIWYG editor for designing workflow forms.	<input type="checkbox"/>	
3.4	The proposed solution must include automatic escalation of workflows after a timeout period.	<input type="checkbox"/>	
3.5	The proposed solution must include a way for end-users to check on the status of any workflows they have initiated.	<input type="checkbox"/>	
4.0	Access Control	Meets	Details
4.1	The proposed solution must include Role-Based Access Controls (RBAC).	<input type="checkbox"/>	
4.2	The proposed solution must provide a way to map resource entitlements to roles, departments, or departments and roles.	<input type="checkbox"/>	

4.0	Access Control	Meets	Details
4.3	The proposed solution must continuously enforce resource entitlements as roles, departments, and employment status changes.	<input type="checkbox"/>	
4.4	The proposed solution must support hierarchical roles.	<input type="checkbox"/>	
4.5	The proposed solution must support hierarchical departments.	<input type="checkbox"/>	
4.6	The proposed solution may allow external applications to query the RBAC directory for role information	<input type="checkbox"/>	
5.0	Auditing/Reporting	Meets	Details
5.1	The proposed solution must log all changes to roles and entitlements in managed systems.	<input type="checkbox"/>	
5.2	The proposed solution must provide a way to access logs and view logged activity from a central point.	<input type="checkbox"/>	
5.3	The proposed solution must provide a way to export logs in common formats (e.g., csv, excel).	<input type="checkbox"/>	

4.2 Technical Specifications

For each specification, the vendor should indicate with a single check, whether or not the proposed solution meets, partially meets, or does not meet the specification.

6.0	Platform	Meets	Details
6.1	All components of the proposed solution must run on Windows Server 2008.	<input type="checkbox"/>	
6.2	Any database components of the proposed solution must run on Microsoft SQL Server 2005 or greater.	<input type="checkbox"/>	
6.3	The proposed solution should use Windows Workflow Foundation as the workflow engine.	<input type="checkbox"/>	
6.4	All components of the solution should be supported in a Virtualized environment using Hyper-V or VM Ware virtualization technologies.	<input type="checkbox"/>	

4.3 Server Requirements

The vendor must complete and attach a Server Requirements Worksheet (0) for each server that will be part of the solution. The vendor is encouraged to fill out the form for both physical and virtual machines. The vendor should not include the server costs in the cost proposal.

4.4 Training

Vendors will include a plan for training Irving ISD's support staff on the proposed solution. At a minimum it should include training for creating provisioning rules for managed systems, use of the workflow form designer, end user portal usage, self-service configuration, administrative portal usage, and account recovery.

5 Response Format

The vendor's proposal should label their responses to each section using the same section headings contained in this proposal. If a section of this proposal does not require a response from the vendor it may be omitted. Partial Specification worksheets should be attached at the end, followed by the server requirements worksheets.

6 Evaluation Criteria

Bids and Proposals are evaluated on a scale of 1 to 10 and weighted as indicated using the criteria specified in Subchapter B, Section 44.031 (b), Texas Education Code, specifically:

- 1) The purchase price; **(20%)**
- 2) The reputation of the vendor and of the vendor's goods or services; **(10%)**
- 3) The quality of the vendor's goods or services; **(10%)**
- 4) The extent to which the goods or services meet the district's needs; **(44%)**
- 5) The vendor's past relationship with the district; **(5%)**
- 6) The impact on the ability of the district to comply with laws and rules relating to historically underutilized businesses; **(1%)**
- 7) The total long-term cost to the district to acquire the vendor's goods or services; **(10%)**

7 Cost Proposal

The vendor must provide a separate, itemized cost proposal that details all of the costs to Irving ISD to purchase and implement the proposed solution. The vendor should provide pricing for 4,000 district employees. The cost proposal should include an itemized list of all licensing details and costs for all proposed software, services, training, and one year of support and maintenance. Hardware costs should not be included in the cost proposal. Travel costs shall not be proposed. Vendor must include travel costs in their proposal as part of the pricing for the goods and services. Vendor may propose more than one system and if so, must provide separate proposals for each. See attachment 8.3 for a sample.

7.1 Modules

If the solution is composed of several modules, each module should be treated as a separate piece of software in the cost proposal and should include both licensing details and costs for the module. Each module should meet at least one specification. The vendor will provide a list of the specifications addressed by each module.

8 Other Attachments

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8.1 Server Requirements

Server Role:

Is the server physical or virtual?

What is the estimated number of identities the server can manage?

Hardware Requirements

	Minimum	Recommended
Processor		
RAM		
Storage Capacity		
Storage Configuration		

Software Requirements

	Minimum	Recommended
Operating System		
Database Management System		
Web Server		
Workflow Engine		

Please specify any other requirements for this server:

8.2 Example Server Requirements Worksheet

Server Role: **Web Server**

Is the server physical or virtual? **Physical**

What is the estimated number of identities the server can manage? **10,000**

Hardware Requirements

	Minimum	Recommended
Processor	One, Dual Core Intel® Xeon® E 3110, 3.0 GHz, 6MB Cache, 1333MHz FSB	Two, Dual Core Intel® Xeon® E 3110, 3.0 GHz, 6MB Cache, 1333MHz FSB
RAM	2GB DDR2, 800MHz, 2x1GB Single Ranked DIMMs	4GB DDR2, 800MHz, 2x1GB Single Ranked DIMMs
Storage Specs	73 GB, 15K RPM, Serial-Attach SCSI 3Gbps	73 GB, 15K RPM, Serial-Attach SCSI 3Gbps x 2
Storage Configuration	Single drive no raid	Two drives part of a single RAID 1 set

Software Requirements

	Minimum	Recommended
Operating System	Windows Server 2003 R2	Windows Server 2008
Database Management System	SQL Server 2005 SP3	SQL Server 2008
Web Server	IIS 6	IIS 7
Workflow Engine	N/A	N/A
Microsoft .Net Framework	Version 3.5 SP1	Version 3.5 SP1
ASP.NET	N/A	N/A

Please specify any other requirements for this server:

8.3 Sample Cost Proposal

The exact layout of the cost proposal does not need to match this example but at a minimum it should include all of the following information.

Description	Licensing Model	Quantity	Total
<i>Identity Management Solution</i>			
(complete all that apply)			
Software one-time costs (Specify)			\$
Active Directory Module	per domain	1	\$
Exchange Module	per person	4,000	\$
Workflow Module	per person	4,000	\$
Self-Service Module	per person	4,000	\$
Other Modules			\$
One-time Configuration and Installation Costs			\$
One year maintenance and support			\$
Training Costs (Itemize)			
System Administrator Training			\$
End User Training			
All Other Costs not listed above (Itemize All)			\$
			\$
			\$
Grand Total			\$

The expiration date of the contract may also be extended for a period agreed to by both parties, not to exceed six months.
All contracts, agreements or any other business affairs with the Irving Independent School District, Irving Texas shall be construed according to the laws of the State of Texas and have venue in a court of competent jurisdiction in Dallas County, Texas.

NON-COLLUSIVE BIDDING CERTIFICATE

By submission of this bid or proposal, the Bidder certifies that:

- a) This bid or proposal has been independently arrived at without collusion with any other Bidder or with any Competitor;
 - b) This bid or proposal has not been knowingly disclosed and will not be knowingly disclosed, prior to the opening of bids, or proposals for this project, to any other Bidder, Competitor or potential competitor;
 - c) No attempt has been or will be made to induce any other person, partnership or corporation to submit or not to submit a bid or proposal;
 - d) The person signing this bid or proposal certifies that he has fully informed himself regarding the accuracy of the statements contained in this certification, and under the penalties being applicable to the Bidder as well as to the person signing in its behalf.
-

Texas Education Code Section 44.034.
Notification of Criminal History of Contractor

a) A person or business entity that enters into a contract with a school district must give advance notice to the district if the person or an owner or operator of the business entity has been convicted of a felony. The notice must include a general description of the conduct resulting in the conviction of a felony.

Vendor response (MUST initial): negative _____ or see attached information _____

b) A school district may terminate a contract with a person or business entity if the district determines that the person or business entity failed to give notice as required by Subsection (a) or misrepresented the conduct resulting in the conviction. The district must compensate the person or business entity for services performed before the termination of the contract.

c) **This section does not apply to a publicly held corporation.** Initial if (c) applies _____

If awarded under this document, vendor agrees to comply, in all relevant respects, with all Federal, State, and Local laws and regulations related to the performance of services or supply of goods to Irving ISD. yes _____ no _____

Signature below certifies accuracy of answers to all sections on this page.

Authorized Signature _____ Printed Name _____

Company Name _____

Telephone Number () _____ Date _____

PAYMENT TERMS

Irving ISD pays net 30 or at point of sale and complies with the State of Texas payment law, Texas Government Code, Chapter 2251.

VISITOR REGISTRY SYSTEM

Pursuant to Section 38.022 of the Texas Education code, vendors must present a valid state or government-issued photo ID before access into the school is granted. This ID will be scanned into a registered sex offender database; any vendor found to be an offender will be denied access into the school. Local law enforcement will be contacted should this occur.

EPCNT

Irving ISD encourages vendors to check yes to the EPCNT clause because other schools can buy with our bid under the same terms. This streamlines the public purchasing process and cuts costs to the public. It also keeps vendors from having to answer multiple bids for many school districts for the same product(s) or services, thereby saving the vendors resources. Do not check yes if doing so would be detrimental to Irving ISD pricing, terms or conditions in your response.

Approximately 56 school districts in the area have formed, through an inter-local agreement, the Educational Purchasing Cooperative of North Texas (EPCNT). You may learn about EPCNT at <http://www.epcnt.com/>. Should any of these entities decide to participate in this bid, would you (the vendor) agree to extend your offer to all member school districts? Terms and conditions and pricing must be the same as for Irving ISD.

_____ NO, _____ YES

If vendor checks yes, the following will apply:

Terms and conditions and pricing will be the same as Irving ISD. Members and participants of the EPCNT will be eligible, but not obligated, to purchase materials/services under the contract awarded as a result of this solicitation. All purchases by members and participants other than the Irving ISD will be billed directly to that entity and paid by that entity. Irving ISD will not be responsible for another entity's debts. Each governmental entity will order its own materials/services as needed.

Signature below certifies authorizes EPCNT participation for this offer by the responding vendor.

Signature _____

Printed Name _____

Company Name _____ Date _____

TO BE SIGNED AND RETURNED

CERTIFICATE OF RESIDENCY

The State of Texas has passed a law concerning non-resident contractors. This law can be found in Texas Government Code under Chapter 2252, Subchapter A. This law makes it necessary for the Irving ISD to determine the residency of its offerors. In part, this law reads as follows:

Section: 2252.001

- (3) 'Non-resident bidder' refers to a person who is not a resident.
- (4) 'Resident bidder' refers to a person whose principal place of business is in this state, including a contractor whose ultimate parent company or majority owner has its principal place of business in this state.

Section: 2252.002

A governmental entity may not award a governmental contract to a nonresident bidder unless the nonresident underbids the lowest bid submitted by a responsible resident bidder by an amount that is not less than the amount by which a resident bidder would be required to underbid the nonresident bidder to obtain a comparable contract in the state in which the nonresident's principal place of business is located."

I certify that _____
(Name of Company Bidding)

is, under Section: 2252.001 (3) and (4), a

_____ Resident Bidder _____ Non-resident Bidder

My principal place of business under Tex. Gov't Code, Section: 2252.001 (3) and (4), is in the city of _____ in the state of _____

Signature of Authorized Company Representative

Print Name

Title

Date

Texas Education Code Chapter 22 Contractor Certification for Contractor Employees

Introduction: Texas Education Code Chapter 22 requires entities that contract with school districts to provide services to obtain criminal history record information regarding covered employees. Contractors must certify to the district that they have complied. Covered employees with disqualifying criminal histories are prohibited from serving at a school district.

Definitions: Covered employees: Employees of a contractor or subcontractor who have or will have continuing duties related to the service to be performed at the District and have or will have direct contact with students. The District will be the final arbiter of what constitutes direct contact with students.

Disqualifying criminal history: Any conviction or other criminal history information designated by the District, or one of the following offenses, if at the time of the offense, the victim was under 18 or enrolled in a public school: (a) a felony offense under Title 5, Texas Penal Code; (b) an offense for which a defendant is required to register as a sex offender under Chapter 62, Texas Code of Criminal Procedure; or (c) an equivalent offense under federal law or the laws of another state.

On behalf of _____ ("Contractor"), I certify that

[check one]:

None of the employees of Contractor and any subcontractors are *covered employees*, as defined above. If this box is checked, I further certify that Contractor has taken precautions or imposed conditions to ensure that the employees of Contractor and any subcontractor will not become *covered employees*. Contractor will maintain these precautions or conditions throughout the time the contracted services are provided.

Or

Some or all of the employees of Contractor and any subcontractor are *covered employees*. If this box is checked, I further certify that:

(1) Contractor has obtained all required criminal history record information regarding its covered employees. None of the covered employees has a disqualifying criminal history.

(2) If Contractor receives information that a covered employee subsequently has a reported criminal history, Contractor will immediately remove the covered employee from contract duties and notify the District in writing within 3 business days.

(3) Upon request, Contractor will provide the District with the name and any other requested information of covered employees so that the District may obtain criminal history record information on the covered employees.

(4) If the District objects to the assignment of a covered employee on the basis of the covered employee's criminal history record information, Contractor agrees to discontinue using that covered employee to provide services at the District.

Noncompliance or misrepresentation regarding this certification may be grounds for contract termination.

Company name _____

Printed name of Company Representative: _____

Signature _____ Date _____