

Education Service Center Region 12

Request for Proposal for an Identity Management System

Education Service Center Region 12 (ESC Region 12 is soliciting proposals for an Identity Management System (IMS) as per specifications stated in this solicitation document. Proposals shall be submitted via email. If proponent wishes to send a hard copy of the proposal it should be in an envelope marked on the outside with the bidder's name, address, and proposal number (RFP#201708-01-IMS) to:

ESC Region 12
Single Sign-on (SSO) Solution
RFP #1212
Attention: Ed Newman
2101 West Loop 340
Waco, TX 76712

Receipt Deadline: ESC Region 12 will not accept any proposals after 12:30 PM, September 1, 2017. ESC Region 12 is not responsible for delayed email delivery or SPAM filters stopping delivery of proposals. Proposals received after the published time and date will be considered untimely and will not be considered. Bids will be reviewed as they are received.

Delivery Method: Responders should submit their proposals via email to kpowers@esc12.net and carbon copy (CC:) enewman@esc12.net. The email subject should be: RFP#201708-01-IMS-%VendorName%.

NOTE: %VendorName% should be replaced with the name of the submitting vendor.

Proposal Number and Format: Responders must submit the proposal in PDF format. ZIP files should not be sent as our email system does not allow .zip files. If the document(s) are larger than can be emailed then a link to download the file(s) is acceptable.

ESC Region 12's contact for this proposal is Ed Newman (enewman@esc12.net). Contact between responders or potential responders and user departments during the request for proposal process or evaluation process is prohibited. Any attempt by a responder or potential responder to contact the departments will result in disqualification.

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1.0 Overview

1.1 About Education Service Center Region 12

Who We Are: We are a nonprofit service organization devoted to supporting educators and school personnel in their efforts to increase student achievement.

What We Do: We provide cost-effective professional development opportunities, expert assistance, direct services and alternative certifications to educators and school personnel.

Per HB 452, resources and services provided by ESC Region 12 are aligned with, and designed to support, the Texas Essential Knowledge and Skills (TEKS) adopted by the State Board of Education.

1.2 Education Service Center Region 12's Vision and Mission

Our Vision

Innovative Solutions. Empowered Learners. Educated Communities.

Our Mission

We partner with schools and communities to achieve student success.

1.3 Current Members

Education Service Center Region 12 spans twelve counties in Central Texas including seventy-six school districts and 15 charter schools. There are approximately 165,000 students within ESC Region 12. Visit http://www.esc12.net/page/about_Schools for a complete listing of our members.

1.4 Objectives of this RFP

The purpose of this Request for Proposal (RFP) is to invite prospective vendors to submit a proposal to supply an Identity Management System (IMS) to ESC Region 12 members at the best price possible. It is preferred that the IMS have a web portal and not require hardware at member sites to function. This RFP provides vendors with the relevant operational, performance, application, and architectural requirements of the system.

1.5 RFP Process and Timelines

The RFP process begins with the issuance of this RFP, which will inform potential Proponents of ESC Region 12's objectives and concludes with the selection of the selected Proponent, any negotiations with said proponent, and the execution of the Agreement with that Proponent.

1.6 Definitions

Definitions are defined in the context of item. If clarification is needed then ESC Region 12's contact for this proposal should be contacted as on the cover page.

2.0 General Conditions

2.1 Indemnity Hold Harmless

Vendor shall indemnify, save and hold ESC Region 12, its trustees, employees, agents, architects, consultants, contractors, attorneys, and guests, harmless from and against any and all claims, damages, liabilities, penalties, costs, charges, and expenses (including reasonable legal fees) which may be imposed upon or incurred or asserted against them in connection with the System(s), or any part thereof, and from the acts, errors or omissions of Vendor, its employees, and/or agents.

2.2 Costs Associated with Preparation of the Proposal

Any costs associated with a Vendor's response to the RFP will be borne by the Vendor. ESC REGION 12 will not be liable for any cost incurred by the respondents in preparing Proposals to this RFP or negotiations associated with award of a contract.

2.3 RFP Binding Period

Prices quoted in the Vendor's response for all labor and materials will remain in effect from the date of the contract to the agreed upon end date during which time Vendor must pass on all price decreases enacted or provided by the manufacturer. In no event shall pricing be allowed to rise above the stated contract prices.

2.4 Omissions

Omission in the Proposal of any provision herein described shall not be construed as to relieve the Vendor of any responsibility or obligation to complete and satisfactorily deliver, operate, and support any and all equipment or services.

2.5 Right to Terminate

ESC Region 12, by written notice to the Vendor, may terminate the Contract, in whole or in part, at any time if the Vendor violates any part of this RFP or contract. Upon receipt of such notice, the Vendor shall take all necessary steps to avoid incurring any additional costs. In the event of termination, Vendor shall provide all plans, engineering, other drawings, and/or all other materials within five (5) business days of termination in a form acceptable to ESC Region 12.

2.6 Product Suitability

The Vendor warrants that the materials to be used under the contract will be new and the sale or use of them will not infringe on any United States or foreign letters, patent, trademark, copyright or other proprietary right, and the Vendor agrees to defend, protect and save harmless ESC Region 12 its employees, agents, successors, assigns, customers, consultants, and users of such items, against all suits at law or in equity, and from all damages and expenses including attorney's fees resulting from claims and demands for actual or alleged infringements of any patent, trademark, copyright or any right by reason of the sale or use of the material covered hereby. ESC Region 12 reserves the right to participate in any such action brought against it at the Vendor's expense.

2.7 Payment Terms and Retainage

As solutions are ordered and installed at individual ESC Region 12 member sites, ESC Region 12 will pay the Vendor for the software/hardware components within 120 days of completion of order, based on inspection and sign-off by ESC Region 12 or its authorized agent.

2.8 Transfer of Contract

The contract shall not be assigned or transferred for any reason, (including sale of company/entity to another company/entity) without written consent from ESC Region 12.

2.9 Amendments and Modifications

The contract may be amended or modified only in writing signed by both parties. The modification, amendment, or waiver of part of this contract shall not constitute a waiver of the whole.

2.10 Venue

The contract shall be construed under the laws of the State of Texas, and venue arising out of this agreement is in McLennan County, Texas, regardless of the place of execution or performance.

2.11 Execution of Contracts

Contracts for purchase will be put into effect by means of purchase order(s) executed by the ESC Region 12 Purchasing Department after each member order has been negotiated, ordered, and installed.

2.12 Vendor's Standard of Care

All work shall be done in a thorough and conscientious manner according to the highest standards of care within the industry and shall be subject to inspection by ESC Region 12, its agents, architects, consultants and others and by the proper authorities. It is expressly understood and agreed that such observations and inspections by ESC Region 12, its other contractors and consultants shall not relieve the Vendor from any responsibility for the proper supervision and execution of the work described in the RFP, or agreed to at a later date.

2.13 Disclosures

By signing its Proposal, a Vendor affirms that he/she has not given, offered to give, nor intends to give at any time hereafter any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor or service to a public servant in connection with the proposal submitted.

By signing its Proposal, a Vendor affirms that, to the best of his/her knowledge, the Proposal has been arrived at independently, and is submitted without collusion with anyone to obtain information or gain any favoritism that would in any way limit competition or give them an unfair advantage over other vendors in the award of this RFP.

Vendor shall note any and all relationships that might be construed as a conflict of interest and include such information with the Proposal. Vendor also shall submit with its Proposal a completed Conflict of Interest Questionnaire in compliance with chapter 176 of the Texas Local Government Code. This form can be found at <https://www.ethics.state.tx.us/forms/CIQ.pdf>.

2.14 Fairness of Pricing

ESC Region 12 shall pay the contract price contained in the winning Vendor's proposal and the successful Vendor warrants that such price is no higher than Vendor's current prices on orders by others for products of like kind and specification covered by this agreement for similar quantities under similar or like conditions and method of purchase.

In the event Vendor breaches this warranty, the prices of the items shall be reduced to the Vendor's current prices on orders by others and overpricing refunded to the ESC Region 12 within 30 days or, in the alternative, ESC Region 12 may cancel the contract, which will be issued upon award, without liability to Vendor for breach or Vendor's actual expense.

2.15 Compliance with Applicable Laws and Regulations

The Vendor shall give notices to authorities and shall comply with all federal, state, local laws, ordinances, rules, regulations, and orders of any public authority bearing on the performance of the Work. Where such laws, ordinances, rules and orders are in conflict, the more stringent standards shall apply.

2.16 Nondisclosure of Relationship with Owner

The Vendor will not, in any manner disclose, advertise or publish the fact that Vendor has contracted with ESC Region 12 to provide the work as specified without the express written consent of ESC Region 12. Nor shall vendor disclose any other information concerning its contract with ESC Region 12 to third parties or its member districts without ESC Region 12's written consent.

2.17 Authority of Owner

Notwithstanding any other provision of the Contract to the contrary, the Vendor, once its activities begin on Site if needed, shall comply with the site rules of ESC Region 12 and the member district. The Vendor shall direct its personnel and subcontractors to respect and abide by the authority of the ESC Region 12 and the Project Manager on all matters related to the Vendors operation at the Site, including but not limited to:

- Use of Site resources such as elevators and loading docks.
- Connection to and use of utilities.
- Safety issues.
- Trash removal and Site cleanliness.
- Site Security
- Prohibition of any alcohol, tobacco, and drugs

2.18 Damage Caused by Vendor

The Vendor shall be responsible for any and all damages to portions of the building caused by it, its employees or subcontractors; including but not limited to:

- Damage to any portion of the building caused by the movement of tools, materials, or equipment.
- Damage to any component, including ceiling tiles, of the construction of spaces in which the Vendor is working.
- Damage to the electrical distribution system and/or other space “turned over” to the Vendor
- Damage to the electrical, mechanical, and/or life safety or other systems caused by inappropriate operation or connections made by the Vendor or other actions of Vendor.
- Damage to any part of the network infrastructure, including but not limited to switches, routers, printers, servers, computers, access points.
- Other Damage to the materials, tools and/or equipment of ESC Region 12, its consultants, subcontractors, Architect, other contractors, agents and leases.

2.19 Material Supplied Beyond Scope of Work

It shall be the responsibility of the Vendor to provide all materials, equipment, and software necessary to fulfill the requirements described herein. Should materials, equipment, and software in excess of the estimates provided prove to be necessary, they shall be provided at no additional cost to ESC Region 12 and/or member district.

2.20 Quality Assurance Standards

The Vendor selected from this RFP shall submit a copy of its company quality assurance manual, applicable procedures, and its SOC Report. If vendor does not have a SOC Report then supporting documentation must be submitted showing a SOC equivalent security control plan or audit.

2.21 Other Terms and Conditions of the Proposal

The Comptroller of Public Accounts (CPA), requires prospective respondents on any solicitation document to affirm their compliance with particular state laws, federal laws or CPA rules. Bidder affirmations become part of any solicitation and are binding terms and conditions of any resulting contract or purchase order. Any misrepresentation or false statement that is deemed material by the state, is a breach of contract, which shall void or make voidable any solicitation or resulting contract. Such respondents may be removed from the Centralized Master Bidder’s List (CMBL) or any other state bid list, in addition to being barred from participating in future contracting opportunities with the State of Texas.

By signing this RFP and submitting a proposal, Proposer certifies that any terms, conditions, or documents attached to or referenced in its proposal are applicable to this RFP only to the extent that they do not conflict with the laws of the State of Texas or this RFP and that they do not impose additional requirements on ESC Region 12. Proposer further certifies that the submission of a proposal is Proposer's good faith intent to enter into an Agreement with ESC Region 12 as specified herein and that such intent is not contingent upon ESC Region 12's acceptance or execution of any terms, conditions, or other documents attached to or referenced in Proposer's proposal.

3.0 Proponent Evaluation Process

The evaluation and selection of a Proponent will happen as part of four-stage process, as following:

- Phase 1 – Mandatory Compliance
- Phase 2 – Pricing
- Phase 3 – ESC Region 12 Partnership
- Phase 4 – Presentations, Demonstrations, Ease of Use & Implementation

The overall scoring will be as follows:

Phase	Points
Phase 1	No points – Pass/Fail only
Phase 2	50 points
Phase 3	30 points
Phase 4	20 points
Total	100 points

3.1 Compliant and Innovative Solutions

In addition to submitting a fully conforming proposal that complies with all mandatory requirements, proponents are encouraged to demonstrate innovation through unique abilities, features, functions, or services.

3.2 Phase 1 – Mandatory Compliance

All proposals will be reviewed for completeness and compliance. Subject to the terms of this RFP, any proposals that do not meet the mandatory requirements, either through failure-to-meet or omission, in any material respect, may be disqualified. Proposals deemed to meet the mandatory response requirements will proceed on to Phase 2, 3, & 4 evaluations.

3.3 Phase 2 – Pricing

All ESC Region 12 members are extremely price conscious, therefore price is one of the strongest drivers in the selection of a vendor(s). Pricing, excluding cost of hardware, should be based on a per student price (**PSP**). The vendor should consider Phase 3 when pricing. The PSP should include a percentage allocated to ESC Region 12 to cover ESC Region 12 cost. If there is minimum price or a minimum number of students it should be noted in the proposal. Hardware if needed should be priced based on number of students.

- PSP Example:
 - Regular price - \$5.50 per student (200 student minimum)
 - ESC Region 12 District Member price - \$3.60
 - Price reflects 20% allocation to ESC Region 12
 - ESC Region 12 price - \$3.00

Proponent Proposals will be normalized and Proponents will be awarded points based on <X%> of the total evaluation score. The formula used for awarding points for the pricing component of the evaluation will be as follows:

Score = (Lowest PSP of all Proposals / PSP Price of Vendor) x Max Price Score

All pricing will be good for at least three years.

3.4 Phase 3 – ESC Region 12 Partnership

It is important for the proponents to understand that the primary goal of this RFP is to establish a three year partnership with a vendor with the option to renew the partnership for up to three more years under this RFP. The goal of the partnership is to benefit all parties; the vendor, ESC Region 12, and ESC Region 12 members.

As a part of this partnership ESC Region 12 agrees to a limited first level of support for its members. ESC Region 12 will be the sole bill to and pay entity for all its members that agree to

participate in this agreement. The vendor agrees to only sale to ESC Region 12 members through ESC Region 12 at the price quoted unless all parties agree in writing. The vendor also agrees that it will never meet or undercut the price quoted in this RFP with any ESC Region 12 member during the terms of the agreement or other Texas ESC's. Failure to meet these terms are grounds for termination as defined in section 2.5 Right to Terminate.

As a partnership, the vendor should understand that ESC Region 12 is not committing to purchasing any services or products until an ESC Region 12 member has committed to the purchase of the product(s) and/or services outlined in this RFP.

Points will be awarded based on: Vendor Market Share = 5 pts max, Similar partnerships with other ESC like entities = 5 pts max, Most perceived benefit to ESC Region 12 = 20 pts max.

3.5 Phase 4 – Presentations, Demonstrations, Ease of Use & Implementation

Phase 4 of the evaluation process will involve interacting with the proponents or their online resources to enable ESC Region 12 to gain additional understanding regarding their proposals. This may include but is not limited to:

- Presentations from the proponent highlighting the key advantages of its proposal in building a partnership with ESC Region 12 and its members.
- Videos highlighting the key advantages of Vendor's solution.
- Vendor's website and other online resources
- Reference check(s) and interview with former clients of the proponents.
- Interactive demonstrations or onsite evaluations to be conducted by representatives of the proponent, who will work with ESC Region 12's expert users to show how the SSO solution will integrate and work with ESC Region 12 members.
 - Please note that ESC12 may have already had a demonstration of a bidder's solution. In such cases another evaluation may not be needed and the previous evaluation can be applied to the points.

Points will be awarded based on: Vendor Videos/Presentation = 10 pts max, Reference Checks = 5 pts max, Videos/Demonstrations/Evaluations = 5pts max

3.6 Final Scoring

Final scoring of the proponent submissions will be based on the combined scores achieved in phases 2, 3, and 4. Final selection will be made from overall score and negotiated options and/or benefits to ESC Region 12.

3.7 Other Evaluation Considerations

At any stage during the evaluation process, ESC Region 12 may:

- Request further clarification on any aspect of the Proponent's response.
- Request a Proponent to supply additional information to support its response.
- Complete a statement of requirements supplementary to this RFP as a result of matters raised by the evaluation or subsequent reference checks.
- Exclude any proposals which ESC Region 12 determines in its discretion to be incomplete or non-compliant with any mandatory requirements of this RFP.

3.8 Timetable

The RFP process timetable is as follows:

Event	Date
RFP Issue Date	08/01/2017
Deadline for Proponent Questions	08/25/2017
Proposal Submission Deadline	09/01/2017 by 12:30 PM
Selection of Selected Proponent & Notification	On or before 10/01/2017

3.8 Form of Submission

Receipt Deadline: ESC Region 12 will not accept any proposals after 12:30 PM, September 1, 2017. ESC Region 12 is not responsible for delayed email delivery or SPAM filters stopping delivery of proposals. Proposals received after the published time and date will be considered untimely and will not be considered. Bids will be reviewed as they are received.

Delivery Method: Responders should submit their proposals via email to kpowers@esc12.net and carbon copy (CC:) enewman@esc12.net. The email subject should be: RFP#201708-01-IMS-%VendorName%.

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ESC Region 12's contact for this proposal is Ed Newman (enewman@esc12.net). Contact between responders or potential responders and user departments during the request for proposal process or evaluation process is prohibited. Any attempt by a responder or potential responder to contact the departments will result in disqualification.

4.0 Technical Specifications

4.1 Project Overview

ESC Region 12 is seeking a partnership with a vendor to provide an Identity Management System solution which will provide a unified integration with district member Student Information Systems, management features, automated provisioning of accounts, Single Sign-on to both in house and cloud based applications, and enhanced workflows which should reduce support requirements and annual operational expenses.

It is preferred that the Identity Management System (IMS) solution be mainly hosted. On premise solutions only, should be noted and may not be accepted for this RFP. The vendor chosen to fulfill this requirement must provide a turnkey solution that has options for simple SSO all the way to complete account creation from a student information systems such as TxEIS or Skyward into the complete IMS solution.

The ultimate goal of this RFP is to provide ESC Region 12 and its member districts a solution that will use SIS data to automatically provision user accounts in as many systems as possible as well as provide a single sign on portal to for all staff and students to systems both in-house and on the internet.

ESC Region 12 has 76 district members and 15 charter schools with a total of approximately 175,000 students. Proponents can visit http://www.esc12.net/page/about_Schools for a complete listing of our members.

It is the goal of ESC Region 12 that all its members will select to purchase this solution through this contract; however, the vendor needs to fully understand that by bidding on this RFP ESC Region 12 is not guaranteeing that any member will select the vendor's product or do business with ESC Region 12 nor is ESC Region 12 obligating to pay the vendor any moneys.

4.2 Description of Existing Conditions

Every ESC Region 12 member is different. For this reason, this RFP is requesting pricing be based on a per student price and a separate price for hardware if needed for more advanced features. We understand that hardware pricing may need to be adjusted or negotiated based on the individual needs of each member district.

4.3 Solution Requirements

The Vendor must identify which IMS features their proposed solution covers:

- Access control
- Cloud computing
- Digital identity management
- Password Manager
- Workflow automation
- Provisioning (Example: User account creation from SIS to AD)
- Single sign-on
- Security Token Service
- Role based access control
- Risk management

The IMS solution must integrate and deliver applications found inside the member district's data center and the growing number of publicly hosted applications. Solution must provide security, access control, single sign-on, SSL encryption to all of the supported application types.

The solution should support the following application types: (descriptions are described below):

- Web - HTTP/HTTPS web applications including: .NET, Apache, Websphere, portals, Sharepoint, PHP, Flash, etc.
- Public Web - HTTP/HTTPS web applications hosted over the Internet
- Windows (Microsoft RDS) - Windows applications published via RDS (Terminal Server)
- Windows (Citrix Server) - Windows applications published via Citrix Presentation Server
- Windows (Virtualized Applications) - Windows applications virtualized via AppZero, Thininstall, Xenocode, InstallFree, App-V, XenApp, etc.
- Client/Server- applications that communicate over non-HTTP protocols (e.g. - database applications, emulators, etc.)
- Telnet - applications and sessions that communicate to backend telnet servers
- VNC - servers and clients that implement any variation of VNC (Virtual Network Computing) for remote control
- Hosted (SaaS) - specific integration to a growing number of Software as a Service applications including Zoho, Google Docs, Zimbra, Salesforce.com, Apple iTunes U, Microsoft Live ID (Office Live, Office 365, OneDrive, etc.)

The following are a list of items the solution should have.

- All pieces to solution should work together in a single, unified, platform and provide for a defensible platform, if not sole source provider

- Should allow quick, automated, secure provisioning of over 300 K12 web resources in a few clicks
- Should auto logout user if inactive for a specific time period
- Should have synchronization ability with LDAP and AD using a visual, drag and drop interface to keep resource assignments current with classroom rosters in near real time
- Should have made to order SSO connectors for LEA-licensed digital resource connectors, if they don't already exist.
- Should have a "try before you buy" option for 3rd party applications.
- Should have a secure, private environment that discourages teachers from exposing student roster data to the WWW, all with automation mentioned above for quick provisioning
- Should have unlimited hierarchies and delegated system administration
- Should be fully brand-able and content localize-able
- Should have the ability to function as a distribution platform for regional ESC's and LEA content and resource partnership
- Most have usage reports that can allow for data driven expense planning
- Should have connectors that can be added to third party to embedded into their website/LMS/CMS
- Should have at least 250+ ready-made connectors to K12 school and classroom digital resources and services common to public, private, and charter schools in Texas
- Should have the ability to integrate resources into SSO environment upon a request from end user local and regional education agencies to accommodate licenses already paid for by such agencies
- Should have the ability to white-label and fully customize the solution, including an option to integrate the system into the UI of a third party service (e.g. Canvas or Moodle LMS, etc.)
- Should have a virtual marketplace or resource center of sorts where end users can peruse digital content, curriculum, applications, and other digital resources so that:
 - Education Service Centers can distribute its own digital resources for free or paid licenses or those of other educational agencies or government entities (such as university teaching programs in support of new teachers)
 - state, regional, or other educational fiscal agencies (such as a buying cooperatives) can facilitate the distribution of third party applications, content, curriculum, and other digital resources through said resource center or marketplace for the purpose of evaluating and acquiring licenses
 - said marketplace enable evaluation, automated provisioning, and procurement as mentioned above across the span of an organization or by individual schools or programs within or as a sub-part of a larger organization

- License management and user provisioning may take place from within the system once procured (procurement taking place either within the marketplace or from outside the marketplace in a “bring your own license” fashion).
- AppStore-like user experience for end-using administrators
- AppStore-like virtual “infrastructure” for resource providers to apply for and be granted access to marketplace so that their offerings may be evaluated for inclusion (curated) and then showcased for distribution through the marketplace as described above
- Ability to monitor utilization, and expiry date of licenses for resources acquired through the system
- Regionalization and localization of both content and “branding” of the system (e.g., free collections of city and/or state historical digital resources available for users in specific regions and locales). This includes SSO connectors for such resources or the commitment to create and support such connectors as part of the system and ongoing service.

4.4 Account Creation, Security, & Syncing

The proposed solution architecture should provide the following:

- Microsoft Active Directory and/or G-Suite account creation from SIS information
- SSL Encryption – the unified cloud solution must encrypt all communications traffic with SSL protocol. This includes all private and public traffic.
- Two-factor Authentication - The solution should support a two-factor authentication process including various types of secondary authentication methods for improved authentication security including:
 - USB Keys (e.g. - USB storage devices, thumb drives, etc.)
 - Secure Tokens (e.g. - SecurID, ActiveCard, etc.)
 - Directory Attributes (e.g. - workforce ID, employee number, etc.)
- Directory Service Integration (DSI) – Solution should have options to allow for direct integration with the network’s directory service to eliminate duplication of user and group management. Integrates with popular directory service products including Microsoft Active Directory, Novell eDirectory, OpenLDAP, and Open Directory.
- SIS - Student Information System - Solution should have an option to create accounts from entities SIS system with TxEIS and Skyward being a must.
- Role-based Access Control – Solution should allow for control access to all unified cloud applications and services by a user’s role within the organization. Leverage directory service integration to assign rights directly to the user, group, or any organizational container.
- Should have the ability to set up a schedule for synchronization with network’s directory service and SIS.

- Should have the option for user to change password with some type of 2-Factor authentication. Password change should be pushed throughout all systems as appropriate.

4.5 Single Sign-On

The SSO solution should support the concept of single sign-on over a web interface portal, providing access to all integrated applications and services, consistently regardless of platform or device used to access the portal.

Description of some of the single sign-on requirements are listed below:

- Web Authentication: the solution should employ authentication methods used to background authenticate users to a web application, portal, or web service (both public or private).
- Basic - the system should send BASIC authentication credentials to the backend web server or service and will support substitution of a password repository solution, single sign on solution, and Directory Service attributes.
- SAML (Security Assertion Markup Language) – the solution should allow for a means of updating a public cloud provider with local user account information. As users access the public cloud service via the private cloud, their account information will be transferred to the provider as a part of the authentication process.
- Advanced (XML) Scripting – The solution should allow for XML Scripting for more advanced forms of Single Sign-on scripting that can be used to create Single Sign-on processes that allow more interaction with applications. This includes the ability to target specific windows elements and to perform specific actions. Advanced scripting will support the substitution of single sign on solution, password repository solution, and Directory Services attributes.
- Database Authentication – The solution should be able to perform single sign-on of users to backend ODBC and JDBC databases through Report Services. Reports can authenticate as a single, generic user account or provide individual authentication credentials. Should support the substitution of password repository solution, single sign on solution, and Directory Services attributes.
- Password Management – the solution should provide the end user with an option to store websites with user and passwords for auto login.

4.6 Management

- The product should be able to be managed remotely from a browser-based interface. Support for at least Internet Explorer and Chrome is preferred.
- Access to the management interface must be password-protected and should be encrypted.
- The management interface should allow for at least two concurrent users

4.7 Support

The vendor of the SSO solution will be expected to assist with initial installation and configuration of the solution at each member district. Remote assistance via a TeamViewer session or similar mechanism will be acceptable.

The vendor of the SSO solution must:

- Provide 24 x 7 online/email and 7:30 to 4:30 toll free telephone support to each member district and/or ESC.
- A second level support number must be provided to ESC Region 12 staff and be available from 7AM to 7PM CST. It must be answered by a support technician within 20 minutes and not sent to voicemail.
 - If additional fees for this service will be needed they should be listed as a line item in the proposal.
- All telephone support calls during 7:30 AM to 4:30 PM CST must be answered by vendor support personnel physically located in the United States.
- Provide timely product updates to address vulnerabilities and defects discovered in the product.
- Provide timely notifications of product updates and advisories by email
- Provide online, downloadable manuals (full documentation) for all components.

4.8 Training

The vendor agrees to offer training to all member districts that have selected their SSO Solution for the term of the contract at no cost to ESC Region 12 or its members at least once per first year of use of product.

The vendor agrees to offer training to ESC Region 12 staff at no charge the first year and at a discounted fee in subsequent years.

The vendor must offer free online courses/module for members that wish to train themselves on the vendor's solution(s). The online material should include videos of how to complete common filtering task such as whitelisting or blacklisting a website.

4.9 Value Added Services

Vendors are encouraged to include products and/or services in addition to the requirements of this RFP to provide the best possible value to the ESC Region 12 and its members. Vendors should clearly identify such products and/or services in their response and also provide a detailed explanation of the merits of such products and/or services.

5.0 General Stipulations of RFP

EDUCATION SERVICE CENTER REGION 12
Waco, Texas 76712

GENERAL STIPULATIONS AND CONDITIONS OF BID/ PROPOSAL

NON-CONSTRUCTION

THESE GENERAL STIPULATIONS AND CONDITIONS SHALL REFER TO EDUCATION CODE
SUBCHAPTER B. – PURCHASES; CONTRACTS

IF THERE ARE CONTRADICTIONS BETWEEN THE GENERAL STIPULATIONS AND
CONDITIONS OF BID/ PROPOSAL AND THE SPECIFICATIONS, WRITTEN OR VERBAL, THE
GENERAL STIPULATIONS AND CONDITIONS OF BID/ PROPOSAL SHALL CONTROL.

I. INVITATION TO BID:

Education Service Center Region 12 invites all interested and qualified Bidders to bid on all proposals in accordance with directions available in the Purchasing Department, 2101 West Loop 340, Waco, TX 76712.

A. For the purpose and clarity of this document only, the word "Region" will herein mean the Education Service Center Region 12 and/or the Board of Trustees of ESC Region 12, McLennan County, Texas. As used herein, the word "Bidder" means any reliable person, entity, broker, vendor, contractor, and/or manufacturer who wants to bid this contract or submit a proposal in response to a request for catalog offer or request for proposal. The term "Bid" refers to all bids, responses, proposals submitted hereunder.

B. Cash discount will be taken into consideration in determining a contract award. All Bid responses must be quoted with net pricing.

C. The Region will receive sealed proposals and or sealed bids until date and time indicated on the Bid cover. Bids must be delivered to the ESC Region 12 Purchasing office. Whenever the specifications indicate a product of a particular manufacturer, model or brand in the absence of any statement to the contrary by the Bidder, the Bid will be interpreted as being for the exact brand, model, or manufacturer specified, together with all accessories, qualities, etc., enumerated in the detailed specifications.

D. Where a lump sum Bid is provided for, unit prices for each item shall be included for accounting purposes. If quantities are increased or decreased as provided for in the "Annulments and Reservations" section, the unit prices inserted in a lump sum Bid should be consistent with the total amount quoted for the lumps sum Bid, since the lump sum Bid total will be increased or decreased by the product of the quantity of the increases or decreases multiplied by the unit prices for the item affected.

E. All materials, supplies, copyrighted materials, furniture, and equipment for the Region shall be delivered F.O.B. Destination freight prepaid and allowed.

F. ESC Region 12 will give preference to materials, supplies, and provisions produced, manufactured, or grown locally, provided such items are equal to articles offered by competitors outside of the local area.

II. ANNULMENTS AND RESERVATIONS:

A. The Region reserves the right to reject Bids for any and all of the items, and/or to waive technical defects, if in its judgment, the interest of the Region shall so require.

B. The Director of Purchasing reserves the right to increase or decrease the given quantity plus or minus fifteen percent (15%). In the event quantities are increased or decreased, the amount added or deducted shall be based upon unit prices quoted.

C. The Region also reserves the right to annul any contract, if it determines at its sole discretion that the Bidder has failed at any time, to perform faithfully any contract requirements or, in the case of any willful attempt to impose upon the Region, materials, products, and/or work inferior to that required by Region, and any action taken in pursuance of this latter stipulation shall not affect or impair any rights or claims of the Region to the damages for the breach of any covenant of the contract by the Bidder.

III. BID PREPARATION, SPECIFICATIONS SHEET, AND BID OPENING:

A. An authorized representative of the Bidder must sign all Bids. It is the intent of this bid offer that should a given bid/bids be accepted, it will automatically become a part of a binding contract. Bidders shall list their bids on the appropriate attached sheets, which show the schedule of items to be purchased. Each Bidder may attach a letter of explanation to their bid to explain any information pertaining to the Bid/Bids.

B. At the time of the Bid opening (as specified on the front cover, ESC Region 12 Purchasing Department webpage and or newspaper ad), the responsible Buyer, or his/her delegated support staff member, shall open and record all Bids received per requirements noted in Texas Education code 44.031. Sufficient time will be allotted to analyze all Bids received and the final recommendations shall be prepared for Region review and approval. Upon Region approval, the Bidders shall be notified either by mail, telephone, or purchase order of any award/awards.

C. Wherever the Region indicates the unit of measure required for bidding purposes, the Region may not recalculate the vendor's price if it is based on a different unit of measure than that indicated in any contract.

IV. BILLING AND PAYMENT/DISCOUNTING:

A. All invoices are to be submitted in duplicate and mailed in accordance with instructions as shown on purchase order (unless otherwise noted).

All invoices shall be forwarded to:

EDUCATION SERVICE CENTER REGION 12
ATTENTION TECHNOLOGY SERVICES
2101 WEST LOOP 340
WACO, TEXAS 76712

B. Invoices will be returned for correction unless they contain the following information: Item numbers; Description of Item; Quantity; Unit Price Extensions and Total. Each invoice shall carry the Purchase Order Number of the Region. The original and one copy shall be forwarded to the office listed above.

C. Payment in full will only be made upon final acceptance of items as shown on Purchase Order. The Region does not pay partial payments. If we are invoiced for items that are not physically received, we must receive either a corrected invoice with the items removed or a credit memo to offset the charges for the non-received goods.

D. The Bidders that request prompt payment of bills shall send signed delivery tickets with the invoice to facilitate expedited payment.

E. Delivery shall be FOB Destination Freight Prepaid and allowed to each individual location as noted on the Purchase Order. The Region will not pay freight bills sent collect.

F. The Region's standard terms for payment are Net 30 days. All discounts, including prompt payment, shall be included in bid price.

V. BONDING:

Certain formal bids and or proposals will require bonding and shall be indicated in the scope of work and or minimum specifications.

VI. COLLUSION:

All Bidders shall sign the appropriate certification as provided on the signature sheet. The Region may reject any Bid that does not include the required certification.

VII. COMPLIANCE WITH SPECIFICATIONS AND PURCHASER'S RIGHT OF SELECTION:

A. The Bidder shall abide and comply with the true intent of the specifications and not take advantage of any unintentional error or omission.

B. The Region reserves the right to reject any or all Bids that comply with these specifications, or to accept a higher bid that complies, when, in the judgment of the Region, such Bid offers additional value or function, which justifies the difference in price.

VIII. DEVIATIONS FROM SPECIFICATIONS:

All deviations from the specifications must be specified in writing by the Bidder, at the time the formal bid is submitted. The absence of a written list of requested deviations or exceptions when the Bid is submitted will hold the Bidder strictly accountable to the Region to the specification or requirement as written. Any deviation from the specifications as written not previously submitted, as required by the above, will be grounds for rejection of the material and/or equipment when delivered. The Region reserves the right to reject or modify any requested exception or deviation. Excessive exceptions may result in disqualification of a bid.

IX. ERRORS IN BIDS: RELIEF OF BIDS:

Bidders or their authorized representatives shall fully inform themselves as to the conditions, requirements, and specifications before submitting Bids. Failure to do so will be at the Bidder's own risk. If a Bidder makes errors in extension of prices in a Bid, the unit price shall govern at the discretion of the Director of Financing.

X. GUARANTEE:

The Bidder shall unconditionally guarantee the materials and workmanship of all merchandise furnished under Bid for a period of one year or longer from date of acceptance of the items delivered and installed unless a different time period is required under the Bid specifications. If, within the guarantee period, any defects or signs of deterioration are noted, which, in the opinion of the Region is due to the faulty design and installation, workmanship or materials, upon notification, the contractor, at its expense, shall repair or adjust the equipment or parts to correct the condition, or replace the part or entire unit to the complete satisfaction of the Region. These repairs, replacements or adjustments shall be made only at such times as will be designated by the Region to cause the least disruption.

XI. INTENT AND LIMIT OF CONTRACT

A. These specifications are intended to cover the various types of purchases of said materials, supplies, or services as hereinafter shown to any or to each of the various public schools, administrative facilities, or to any designated warehouse or warehouses in the Region, whichever if specified, in quantities to be determined subsequent to the bid opening.

B. It is understood that under the terms and conditions of this bid offer, the Region reserves the right to purchase any of the listed materials, supplies or services at bid prices submitted provided that it shall be optional on the part of either party to terminate this contract at the expiration of twelve months from the beginning date of any contract period upon notice in writing to the other party to any contract no less than 30 days prior to the expiration of the twelve month period. This will be the only opportunity for cancellation of this contract, except for extenuating causes.

XII. "OR EQUAL" INTERPRETATION CLAUSE:

A. Any time a particular manufacturer's name or brand may be specified, it shall mean any product of equal quality. Bids shall be considered on all other brands submitted and on

XII. "OR EQUAL" INTERPRETATION CLAUSE (continued):

the equal quality product of other manufacturers. On all such Bids, the Bidder shall indicate clearly the product on which it is bidding, and shall supply sufficient data, on its own letterhead, to enable an intelligent comparison to be made with the particular brand or manufacturer specified.

B. Catalog cuts and descriptive data shall be attached to the original copy of the Bid, where applicable. Whenever the specifications indicate a product of a particular manufacturer, model, or brand, and in the absence of any written statement to the contrary by the Bidder, the Bid shall be interpreted as being for the exact brand, model or manufacturer specified, together with all the accessories, qualities, etc., enumerated in detailed specifications. (See VIII.)

Failure to submit the above information may result in rejection of bid.

XIII. PACKING AND DELIVERY:

A. All materials must be securely packed for proper protection and in quantities to be determined by the Region's Director of Technology.

B. All materials delivered pursuant to this bid offer shall be packed in a substantial manner in accordance with accepted trade practice. No charges may be made over and above the bid price for packaging. Complete deliveries must be made by the successful vendor to the designated location as indicated on Bid cover and/or purchase order after issuance of purchase orders by the Region. A packing slip and/or delivery ticket shall be included in each shipment. Each ticket shall contain the following information for each item delivered: Purchase Order Number, Item Description, Item Number, Quantity, and Vendor Name.

C. Failure to comply with this condition shall be considered sufficient reason for refusal to accept the goods or services awarded and ordered.

D. All package materials shall be clearly and plainly marked.

XIV. SAFETY REQUIREMENTS:

The Bidder/vendor shall provide all equipment, machinery and chemicals furnished and delivered to the Region in compliance with the Safety Regulations as required by OSHA.

XV. SAMPLES: CATALOGS: CATALOG CUTS:

A. When requested, a sample, properly tagged, shall be submitted by each Bidder before the time of the Bid opening. The tag on the sample shall indicate the item number, the name of the company submitting the sample, and the Bid number.

B. The Region will not be responsible for any samples that a Bidder has not picked up within 30 days after being notified that the sample is no longer needed. Samples may be retained by the Region until Bidders are notified to remove them. Bidders agree that the Region will incur no liability for samples that are damaged, destroyed or consumed in the testing processes. Samples requested are to be delivered as noted and designated per the particular solicitation.

XVI. SIGNATURE TO BIDS:

Each Bid must show the full business address and telephone number of the Bidder and be signed by the person or persons legally authorized to sign contracts. All correspondence concerning the Bid and contract, including Notice of Award, and Purchase Order, will be mailed or delivered to the address shown on the Bid in the absence of written instructions from the Bidder to the contrary.

XVII. TAXES:

- A. The Region is exempt from the payment of the Texas Sales Tax. Exemption Certificates for the Federal Excise Tax may be furnished upon request.
- B. Prices quoted shall not include federal excise or state sales and use taxes.
- C. The Region's Tax Identification Number is 74-1586927.

XVIII. DELIVERY:

- A. All deliveries shall be made during the hours of 8:00 a.m. and 4:00 p.m. on all regularly scheduled business days, except where otherwise noted.
- B. All deliveries shall be made inside school buildings, warehouse, offices, etc., and special instruction for date of delivery shall be included in the general specifications.
- C. Special instructions may be indicated by the Region in the specifications for exact time, date and delivery locations for particular equipment and machinery (heavy or otherwise) which are to be erected, set-up and installed.
- D. Materials delivered and received centrally will be accepted by motor freight.

XIV. SIGNATURE:

By signing this RFP below confirms that I/we:

1. propose to furnish, package, mark, and deliver to the Region , the supplies, materials or equipment as required in the accompanying specifications, and at the unit price indicated;
2. certify that this bid is made without any previous understanding, agreement, or connection with any person, firm, or corporation making a bid for the same supplies, material and equipment, and is in all respects fair and without collusion or fraud;
3. certify that this firm is an equal opportunity employer and that all employment decisions are made without regard to the color, race, sex, national origin, religion, age, or disability status of otherwise qualified individuals; and
4. certify that all material and equipment bid by this firm and to be supplied to the Region meets all safety and health standards as prescribed by the rules and regulations of the Occupational Safety and Health Act (OSHA).

ESC Region 12 Statement of Equal Opportunity & Nondiscrimination

The Education Service Center Region 12 does not discriminate on the basis of race, color, national origin, sex, religion, age, disability, or genetic information in its programs, activities, or hiring practices. Auxiliary aids and services are available upon request to individuals with disabilities. Inquiries regarding the Title IX policies should be directed to the Office of Human Resources, Certification & Marketing Services at ESC Region 12, 2101 W. Loop 340, Waco, TX 76712 or (254) 297-1212.

6.0 Signature - RFP #201708-01-IMS

The undersigned certifies he/she is authorized to obligate the represented firm and further agrees with all terms, conditions, and requirements of ESC Region 12's RFP.

Legal name of Proposer Company:	
Address of office that would be providing service under the Agreement:	
Number of years in Business:	
State of incorporation:	
Number of Employees:	
Annual Revenues Volume:	
Name of Parent Corporation, if any:	

Printed Name	
Title	
Date	
Direct Phone Number	
email Address	

Signature: _____