



UNIVERSITY OF ARKANSAS SYSTEM

IAM RFP for Software and Services University of Arkansas System

Pre-Proposal Conference

June 15, 2017

Reminders Before We Start...

- ▶ Acknowledgement of your attendance at this meeting is required; please email Whitney Smith (wesmith@uark.edu) with your firm's contact information and whether your firm intends to submit a proposal
- ▶ Please hold your questions to the Q&A session at the end
- ▶ Additional questions after this call may be submitted in writing. The deadline for submission is tomorrow (Friday, June 16)
- ▶ Arkansas Technology Access Clause: As noted in the Standard Terms & Conditions Document for this RFP, vendors are required to comply with this request by submission of a Voluntary Product Accessibility Template (VPAT) with their proposal
- ▶ Be sure to sign all bid documents where required and submit with your proposal
- ▶ Nothing in this presentation alters the RFP. In the event of a conflict, the RFP and its official amendments shall prevail

Agenda

1. Welcome and Introductions
2. Background and Purpose
3. Scope of Solicitation
4. Proposal Highlights
5. Evaluation and Demonstrations
6. Questions and Conclusion

Introductions

- ▶ Stephen Herzig, Director of Enterprise Systems, University of Arkansas Fayetteville (UAF)
- ▶ Don Faulkner, Chief Information Security Officer, UAF
- ▶ Kerry McLaughlin, Director, Project Management Office, UAF
- ▶ Eva Marie Owens, Security Analyst
- ▶ Kendra Grant, Technical Assistant
- ▶ Becky McCoy, Contract Manager, IT Services, UAF
- ▶ Whitney Smith, Procurement Coordinator, UAF
- ▶ John Cook, Consultant with ISG Public Sector

Background

- ▶ New Identity and Access Management (IAM) system being sought by the University of Arkansas System on behalf of the member institutions of the System
 - University of Arkansas, Fayetteville (UAF)
 - University of Arkansas at Fort Smith (UAFS)
 - University of Arkansas at Pine Bluff (UAPB)
 - University of Arkansas at Little Rock (UALR)
 - University of Arkansas at Monticello (UAM)
 - Cossatot Community College of the University of Arkansas (CCCUA)
 - Phillips Community College of the University of Arkansas (PCCUA)
 - University of Arkansas Community College at Batesville (UACCB)
 - University of Arkansas Community College at Hope (UACCH)
 - University of Arkansas Community College at Morrilton (UACCM)
 - University of Arkansas Division of Agriculture
 - Arkansas School for Mathematics, Sciences, and the Arts
 - University of Arkansas System eVersity
 - University of Arkansas Medical Sciences (UAMS)
 - Rich Mountain Community College (pending merger completion)
 - Pulaski Technical College (pending merger completion)

Background

- ▶ System is currently procuring a new Enterprise Resource Planning (ERP) solution for all member institutions, and would like for the new ERP solution to go into production using the new IAM solution
- ▶ As of today, the System expects a decision soon between the two announced ERP finalists, Oracle and Workday
- ▶ Additionally, UAF is implementing a redesigned Active Directory, and would like IAM to be in place for that deployment
- ▶ The ERP implementation is expected to start early in 2018 with the first components going into production no earlier than July 1, 2019
- ▶ The IAM procurement timeline has been accelerated so that the IAM solution may be procured, designed and deployed to coordinate with ERP and Active Directory
- ▶ The System procurement is being coordinated through the IT Services department at UAF, but will involve participation from other System campuses

Purpose

- ▶ The System's vision is an enterprise IAM system that will:
 - Simplify the process of applying to colleges and universities;
 - Simplify the process of transferring from one campus to another;
 - Simplify the process of taking courses at multiple campuses;
 - Simplify the process of applying for employment at all units;
 - Simplify the process of working at one campus while taking classes there or elsewhere in the System;
 - Manage identities and roles, and define system access for university students, faculty and staff across university organizations;
 - Use Federated Single Sign On for all compatible applications; and
 - Provide Privileged Account Management where needed.

Scope of Solicitation

- ▶ There are two phases to the IAM procurement, and both phases are presented in this RFP
 - RFP Phase 1 procurement: Software and Hosting Services. In this phase, the System will receive Phase 1 proposals, and evaluate and select an enterprise IAM solution that is offered as a cloud product or includes comprehensive hosting services
 - RFP Phase 2 procurement: Implementation Services. In this phase, the System will receive Phase 2 proposals, and evaluate and select a services vendor to provide all needed services to deploy the selected solution across the enterprise
- ▶ There is not a separate RFP for Phase 2; instead, there will be two responses possible (phase 1 and phase 2) to this RFP
 - The Phase 1 response will be for software and hosting services only
 - The Phase 2 response is for services. It will not be due from vendors until the product for Phase 1 has been awarded, so that Phase 2 service responses may be tailored to the selected IAM solution. The Phase 2 proposal due date will depend on the award date for the solution selected in Phase 1

Scope of Solicitation

- ▶ Respondents may respond to either Phase 1 (software and hosting services) or Phase 2 (implementation services)
 - A response to both phases is not required
 - If a Respondent plans to respond to both phases, the Respondent may submit separate proposals on the two appropriate due dates, or a combined proposal on the Phase 1 due date
- ▶ Any Respondent that anticipates an opportunity to submit a proposal for either phase MUST participate in today's mandatory pre-proposal teleconference, and follow-up with their "statement of intent" to submit a formal bid response to Phase 1 and/or Phase 2. (i.e. if a Respondent plans to submit a response for Phase 2 only, they are still required to participate in the call and submit a statement of intent)
 - Email Whitney Smith (wesmith@uark.edu) with contact information and a statement of intent to submit a proposal for Phase 1 and/or Phase 2 by tomorrow (Friday, June 16)

What is Being Procured?

- ▶ Phase 1 Proposal: Software (see RFP Section 14), including Hosting/Cloud
 - Identity Life Cycle and Governance
 - Role Based Access Control
 - Self-Service password reset
 - Federated Single Sign On
 - Multi-Factor Authentication
 - Account Isolation and Credential Revocation
 - Requestable Roles
 - Access control review and reattestation
- ▶ Phase 2 Proposal: Implementation Services
 - Full lifecycle design, deploy and support services for all institutions
 - Due to the complexity of implementation across all member institutions, the System has specified for the proposal a first stage for implementation (limited institutions and functionality) for which it will require a fixed fee bid
 - Stage 1 efforts includes a deliverable to analyze the parts of the implementation not in the first stage (functionality and institutions) and develop a Statement of Work and timeline to complete the deployment across the System

Tentative Procurement Schedule

▶ These dates are estimates and may be updated during the procurement

Thursday, June 8, 2017 RFP released to prospective Respondents
Thursday, June 15, 2017 10:00 AM CST – MANDATORY Pre-Proposal Conference

Phase 1 Procurement

Friday, June 16, 2017 5:00 PM CST - Last date/time questions are accepted
Friday, June 16, 2017 Last date for submitting Statement of Intent (Phase 1 or 2)
Wednesday, June 21, 2017 Last date for issuing an addendum
Friday, June 30, 2017 Phase 1 Proposal submission deadline 2:30 PM CST
July 24 – July 28, 2017 Software Demonstrations/Respondent Presentations
August 3, 2017 Notice of Intent to Award
Upon Award Contract Negotiations Begin (upon intent to award)
September, 2017 Phase 1 Award (Software and Hosting Services)

Phase 2 Procurement

One Week After Ph. 1 Award Phase 2 Proposal submission deadline 2:30 PM CST
Late September Software Demonstrations/Respondent Presentations
October Notice of Intent to Award
Upon Award Contract Negotiations Begin (upon intent to award)
November, 2017 Phase 2 Award (Implementation Services)

November, 2017 Service to Commence

Proposal Highlights

- ▶ RFP Sections 15 and 16 dictate the proposal contents for the Phase 1 proposal
- ▶ RFP Section 17 and 18 dictate the proposal contents for the Phase 2 proposal
- ▶ A combined proposal must contain all elements of all four sections
- ▶ Three appendices are provided for scoping information only
 - RFP Appendix 1: Diagrams of Current Environments Related to Identity and Access
 - RFP Appendix 2: Important Metrics for the University of Arkansas System
 - RFP Appendix 5: IAM Software Environment
- ▶ Two appendices require a response with the Phase 1 proposal
 - RFP Appendix 3: Software and Hosting Service Cost Schedules (Excel file)
 - RFP Appendix 4: Functional Requirements (Excel file)
- ▶ Appendix 6 may be used as model language for Phase 2 Statement of Work
 - RFP Appendix 6: Model Statement of Work

Submitting Your Proposal

- ▶ See RFP Section 10.4 for submission requirements
 - Both Phase 1 and Phase 2 proposals require a signed original paper copy, one additional paper copy and an electronic copy
 - If the vendor wishes to redact any portion of the proposal from public information requests, a separate complete redacted electronic copy must be submitted
 - Submit Cost Proposal in separate envelope/package
- ▶ Mandatory Requirements for Phase 2 (implementation services) Respondents
 - The Respondent for Phase 2 will be required to be a certified partner of the IAM software product selected in Phase 1, assuming that this product has a program that certifies its implementers
 - Additionally, the primary implementations services vendor will be required to show that it has completed an implementation of the selected product for a customer that is comparable in size and complexity to the University of Arkansas System
 - Failure to meet these two mandatory requirements will disqualify the implementation services vendor from responding, and will result in rejection of the Respondent's Phase 2 proposal

Evaluation and Demonstrations

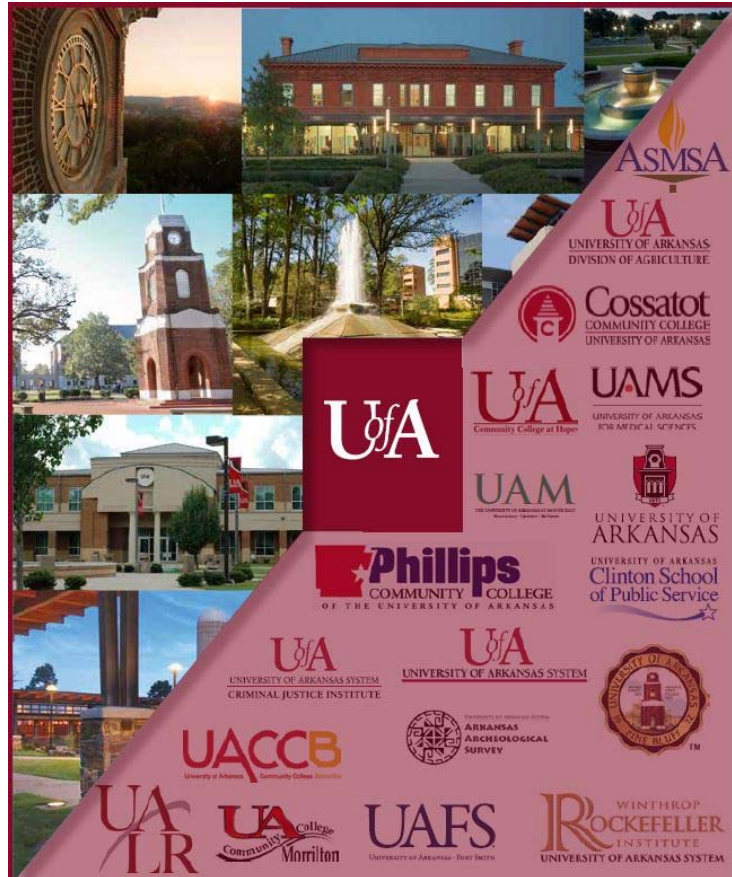
- ▶ Evaluation Criteria for Phase 1 (Software and Hosting Services)
 - Quality, Functionality, and Capability of Solution (50 Points)
 - Qualifications and Experience (20 Points)
 - Cost (30 Points)

- ▶ Evaluation Criteria for Phase 2 (Implementation Services)
 - Project Approach and Methodology (30 Points)
 - Firm Qualifications and Experience (20 Points)
 - Proposed Project Team Experience (20 Points)
 - Cost (30 Points)

- ▶ Following dates are projected for on-site vendor presentations by finalists
 - July 24 – July 28, 2017 for Software Demonstrations
 - Late September for Service Provider Interviews

Questions

*We will answer submitted questions,
and then take your additional questions as time permits.
If we don't get to your question, please submit in writing following the call.*



All questions and contact must be directed to:
Whitney E. Smith wesmith@uark.edu