

Open Source Identity Management for Higher Education Initiative

REQUEST FOR QUOTE (RFQ)

RFQ Release Date: January 30th, 2012

RFQ Closes: February 13th, 2012 at 5PM PST

RETURN RFQ RESPONSE VIA EMAIL TO:

OSIdM4HE Strategy and Organization subcommittee
osidm4he-stratorg@internet2.edu

I. INTRODUCTION

The Quali Rice project and Internet2, along with several other interested parties, are requesting consulting services to review and further the proposed joint development work efforts commonly known as the “Open Source Identity and Access Management for Higher Education” (OSIdM4HE working code name). Over the summer and fall of 2011 several representatives from various institutions of higher education, who also represent non-profit higher education consortiums (Quali, Internet2, Jasig) met to discuss possible joint development efforts to establish a comprehensive suite of Identity and Access Management solutions for higher education. Work efforts were divided into 5 main areas: Registries, Provisioning, Access Management, Authentication, and Organization and Strategy. Details of the work already performed around this proposed joint development effort can be found at:

Public wiki space:

<https://spaces.internet2.edu/display/OSIdM4HE/OSIdM4HE+Initiative>

Working Team wiki

space: <https://spaces.internet2.edu/display/OSIdM4HEteam/OSIdM4HE+Team>

II. PURPOSE

The OSIdM4HE interested parties are seeking support services to create documents and presentations that help refine the strategy and market it to potential interested parties for investment decisions. The following are the expectations and anticipated scope of consulting services and to be met in a consulting services contract.

III. PREREQUISITES

Those submitting quotes need significant experience in the areas listed below. Failure to provide supporting documentation may lead to disqualification.

1. Identity and Access Management – A qualified candidate has a functional understanding of the various components that make up an Identity and Access Management System.
2. Higher Education – A qualified candidate has 5+ years of experience working in or for higher education.
3. Open Source Software – A qualified candidate has 5+ years of experience working within with Open Source space and has a good understanding of the differentiators between Open Source and Commercial products and services.
4. Communication - Excellent writing and verbal communication skills

5. Remote Work Environment - Ability to work and collaborate remotely leveraging conference calls, email, wikis and web conferencing to manage the majority of the deliverables.

PREFERRED ATTRIBUTES

1. Strong marketing background

IV. SCOPE OF WORK & TIMEFRAME

Working closely with the OSIdM4HE Strategy and Organization subcommittee, the selected candidate will need to help guide and where necessary, lead the work necessary to develop and document a high-level "Business Plan" that can be used to garner investments from C-level staff at Universities, supporting organizations and vendors. The Business Plan will be composed of both a white paper and an executive presentation overview. It should include and incorporate the following:

- A business case justification explaining the overall solution along with benefits and return on investment that higher education institutions can expect.
- Consolidation and improvement of the various reports and templates already developed by the organization and strategy work team, including but not limited to the "Coordination Agreement", "Memorandum of Understandings", high level product "Reference Architecture" diagrams, "Scope and Principles" document.
- A review of the high-level functional requirements and fit / gap analysis within the five core work areas of Registries, Provisioning, Access Management, Authentication, and Shared Services. Attend weekly conference calls of each work area team as necessary to ask questions and get clarifications.
- Facilitation of the OSIdM4HE StratOrg group in the selection of a project name and branding strategy for the overall solution set. Consideration should be given to existing consortium products and branding changes.
- A high-level, overall product development timeline with resource assumptions needed to complete the work within one, two and three year time horizons.
- An implementation strategy including a comprehensive exposition of the overall solution set and identification of the challenges institutions will face in migrating to the proposed solution..

The selected candidate will help arrange, attend and facilitate a two to three day summit of contributors to the OSIdM4HE work teams to gain consensus on development strategies and estimates for each work area. This will include driving consensus on high-level assumptions on necessary existing open source product modifications.

All work outlined in this RFQ is expected to be completed by April 15th, 2012.

V. RFQ SCHEDULE AND DEADLINES

- **RFQ Release Date:** January 30th, 2012
- **Question and Answer Period Deadline:** February 2nd, 2012
- **Question and Answer Addendum Release Deadline:** February 6th, 2012
- **RFQ Response Deadline:** February 13th, 2012 at 5PM PST

VI. COMMUNICATIONS REGARDING THE RFQ

Proposers may make written inquiries concerning this RFQ by e-mail to the OSIdM4HE Strategy and Organization subcommittee. All inquiries must state “Question regarding RFQ” in the email subject line and be received by the Question and Answer Deadline above. Individual questions will not be answered directly to submitter. All questions submitted shall be responded to as an addendum to the RFQ. The addendum will be e-mailed to each potential responder.

Direct all questions to: OSIdM4HE Strategy and Organization subcommittee,
osidm4he-stratorg@internet2.edu

VII. RFQ ADDENDUM

All questions shall be summarized and answered by an addendum issued by the OSIdM4HE Strategy and Organization subcommittee.

VIII. INSTRUCTIONS FOR SUBMITTING QUOTES

Responders must submit their quotes in PDF format, via email to the OSIdM4HE Strategy and Organization subcommittee (osidm4he-stratorg@internet2.edu) before the deadline stated above. Late quotes will not be accepted.

Responses should adequately address Sections III and IV above and be accompanied by an itemized price quote and 3 professional references. Responses should also contain the following company and individual consultant information:

Company Name:
Business Address:
Business Phone:
FAX:
Contact Person/Title
Email Address:
Signature of Authorized Individual

IX. PROPOSER PRESENTATIONS

The OSIdM4HE Strategy and Organization subcommittee may request a follow up phone conversation/interview with high scoring responders.

X. QUOTE EVALUATION AND CONTRACT AWARD

Quotes will be evaluated by an RFQ review committee named by the OSIdM4HE Strategy and Organization subcommittee. No one representing or associated with a responder to the RFQ will be allowed to serve on the RFQ review committee

Any contract resulting from this RFQ will be awarded to the proposer whose quote, in the opinion of the RFQ review committee, offers the greatest overall benefit to the OSIdM4HE Initiative when considering the total value to be delivered, including, but not limited, to

- 1) The quality of professional services offered
- 2) The respondent's experience in the areas identified in Section III (Prerequisites) above including:
 - a) in the field of identity and access management
 - b) working with institutions of higher education and the open source software development community
 - c) involving a significant component of working remotely

The RFQ review committee reserves the right to accept or reject any or all responses, make one award, or make no award. This group reserves the right to award an opportunity to negotiate an agreement after reviewing, evaluating, and comparing all responses to this request. Following selection, this group will negotiate exclusively with the selected proposer regarding specific tasks, costs, terms and conditions. If, during the negotiations, this group determines at its sole discretion that a satisfactory agreement is not possible or is unlikely, this group may end negotiations and enter into negotiations with another proposer or pursue other alternatives, whichever is in its best interest.

XI. QUOTE PREPARATION COSTS

All labor, materials, and miscellaneous costs incurred and expended by a participating proposer in order to respond and produce and perform the submittal requirements of this RFQ shall be borne entirely by the proposer.