

Call for SOW Proposals Template

Call for Statement of Work – Consulting Services for OSIdM4HE

The Kualu Rice project, 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 (Kuali, 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.at.internet2.edu/display/OSIdM4HE/OSIdM4HE+Initiative>

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

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.

- Resources knowledgeable in Identity and Access Management products, services and implementations within the higher education community.
- Resources experienced in writing high level strategy, development and marketing plans for major initiatives within the higher education community.
- Review and improve the templates already developed by the organization and strategy work team including the “Coordination Agreement”, “Memorandum of Understandings”, high level product “reference architecture” diagrams, “Scope and Principles” document.
- Review the functional requirements and fit / gap analysis of existing products within the 4 core work areas of Registries, Provisioning, Access Management, and Authentication. Attend weekly conference calls of each work area team as necessary to ask questions and get clarifications.
- Attend and facilitate a 2 to 3 day summit of contributors to the OSIdM4HE work teams to gain consensus on starting points for each work area. This will include driving consensus on which existing products to start development on and high-level assumptions on necessary product modifications.
- Create a high-level, overall product development timeline with resource assumptions needed to complete the work within 1, 2, and 3 year time horizons.
- Create a strategy white paper expounding the relative overall solution set and challenges institutions will face in migrating to the overall solution.
- Create a business case presentation explaining the overall solution along with benefits and return on investment that higher education institutions can expect.
- Make suggestions on the name and branding of an overall solution set along with implications for existing consortium products and branding changes.
- Complete all work outlined in the Statement of Work by the end of February, 2012.