

Justification/Input Document for "Bid Waiver"

Title: Security Awareness eLearning Solution

ITB #

It is the policy of Miami-Dade County, to consistently purchase goods and services using full and open competition. The citizens of Miami-Dade County are best served when we make sound business decisions based on competitive bids or proposals. Early acquisition planning that includes DPM can help to avoid delays and to facilitate effective market research. However, there may be instances when other than full and open competition may be justified. When a user department(s) determines that other than full and open competition is necessary or in the best interest of the County, appropriate justification for that course of action must be submitted to the CA Office for approval and execution in order to waive the competitive bid/proposal process.

Please provide the information requested below to support the need and feasibility for waiving the competitive bid/proposal process. Est. Value: 150,000.00

Purchase Requisition No. RQET1400008 Contract #: Date Required: 6/1/2014 Comm. #:

Proposed Vendor: Inspired eLearning Previous Contract #: N/A Estimated Cost: 150,000 (3 years) BCC Date: N/A

Please see attached document

At this time Inspired eLearning is the sole source provider for maintenance and upgrades of their proprietary training software products. There is no other choice for maintenance. The allocation requested is for a three-year initial term.

Please see attached document

Not applicable.

Mirta Cardoso (305) 596-8690
Contact Person and Phone #
Department Director's Approval
Date Approved

263844



INTERNAL SERVICES DEPARTMENT
PROCUREMENT MANAGEMENT SERVICES

Justification/Input Document for Non-Competitive Acquisition

It is the policy of Miami-Dade County to consistently purchase goods and services using full and open competition. The citizens of Miami-Dade County are best served when we make sound business decisions based on competitive bids or proposals. Early acquisition planning that includes consultation with Internal Service Department's procurement staff can help avoid delays and facilitates effective market research. However, there may be instances when other than full and open competition may be justified. When a user department(s) determines that other than full and open competition is necessary or in the best interest of the County, appropriate justification for that course of action must be submitted to ISD for approval and execution in order to waive the competitive bid/proposal process.

Please provide the information requested below to support the need and feasibility for waiving the competitive bid/proposal process:

Department:	Information Technology Department		
Contact Person:	Lars Schmekel	Phone Number:	305-596-8779
Requisition No.:	RQET1400008	Estimated Value:	\$150,000.00 (3 years) – Funding Model
Proposed Vendor:	Inspired e-learning		
Previous Contract Number:		Previous Contract Value:	

Purpose of the Purchase

The purpose of this purchase is to ensure the continued delivery of Information Security Awareness training for all County employees. For the past 3 years, Miami Dade County has been utilizing Inspired e-learning to provide online courses (training) and hosting services for the delivery of targeted content to improve Information Security Awareness for all County employees as well as provide enhanced, targeted curriculum to IT Staff and knowledge workers who interact with confidential data (HIPPA, PCI and PII).

The initial implementation of the hosting and training modules included extensive work to properly brand the generic training to meet County Standards. This customization also encompassed inclusion of links to County Policy and user acceptance of County policies. Custom interfaces have been jointly developed to allow County to seamlessly login to the learning system and provides metrics and reporting on individual, departmental and County utilization and completion designed to measure completion, compliance and effectiveness of the solution.

From a content perspective, the County has already reviewed the predefined content and made modifications it felt necessary to make the training applicable and relevant to the County. If another vendor were selected, any users with classes in progress would need to re-take the classes in their entirety as content will vary from vendor to vendor.

For operational continuity and ongoing training content continuity, it is in the best interest of the County to obtain these services with inspired elearning.



Minimum Requirements for the Security Awareness eLearning Solution

For each specification below, describe how you will meet that specification

1. As a minimum following courses are needed with contents that specifically covers following topics
 - o Basic Information Security Awareness training.
 - o Annual Basic Information Security Awareness refresher training
 - o Advanced Information Security Awareness training.
 - o Comprehensive Information Security Awareness module (combining Basic and Advanced classes into a single module)
 - o Information Security Awareness for IT Staff
 - o Information Security Awareness for Supervisory/Management Staff
 - These classes should cover basic information on security concepts such as, but not limited to, information security best practices, protection of system passwords, social engineering, phishing, appropriate e-mail content, the use of secure websites, mobile data protection, social media use and security/privacy, remote worker security, cloud security, and the protection of personally identifiable information.
 - o Payment Card Industry (PCI) Security awareness training and standards for cardholder data processors and supervisors
 - o Payment Card Industry (PCI) Security awareness training and standards for IT staff
 - o Red Flag Identity Theft Training Program.
 - o Anti-Phishing Training
 - o Privileged user security training
 - o Physical security for IT training
 - o Security while working remotely
 - o Basic web application development security awareness/vulnerability training
 - o General privacy basics
 - o Data and record retention best practices
2. In addition to be above mentioned courses, Miami-Dade County must be able to upload in-house developed trainings into this system and be able to track and monitor like the vendor provided trainings
3. A customizable, copy-right free monthly newsletter for the duration of the license period should be provided covering relevant security topics
4. Security Awareness screensavers and Print ready digital posters covering security topics should be included as part of subscription
5. Course customization is required to enable specific County policies and branding. Must link to County security policies with employee acceptance page.
6. The content must be customizable to accommodate any County specific requirements.
7. All courses must adhere to an enterprise site license capable of supporting unlimited (currently 30,000+) Miami-Dade County Employees with 3 year licensing provided that provides no less than annual course updating (content must be updated

- regularly to keep pace with threats changes).
8. Must be interactive and engaging, including live exercises within courses to emphasize key concepts, with options for voice narration or text only.
 9. Must support bookmarking and provide a glossary of terms.
 10. Maximum course length (for each course) should be 60 minutes including any testing.
 11. The courses must be based on best practices, standards, and regulations: ISO27001/27002, NIST section 800, COBIT, FISMA, PCI, GLBA, SOX, etc.
 12. Each course must support an option for administering a final exam. The final exam must provide randomized questions at end of course so employees do not get same questions every time. Each final exam must be customizable as to the passing grade percentage. Each course final exam must support a recorded score
 13. The courses must provide a Certificate of Completion upon passing each course.
 14. The courses must support current and future versions of industry standard web browsers such as Internet Explorer, Mozilla Firefox and Safari.
 15. The courses must be organized in such a way as to support roles based content.
 16. Technical support must be available by phone during normal business hours and email with 4 hour response time outside of business hours.
 17. Miami Dade County Employee ID number should be used as the key identifier in the training system
 18. All the training related information (such as employee ID number, training completion status for each assigned course, email address, employment status, Department/Division/Location information) should be able to be exported and send in a secure FTP format daily.
 19. Hosting System should integrate with Miami-Dade County's Single Sign on solution
 20. Hosting system should be available and be able to handle the traffic volume 7 days a week 24 hours a day; except for the maintenance windows agreed upon by the vendor and Miami-Dade County

Benefit

An organization's people, information, operations, and systems are critical assets. Protecting the safety, confidentiality, integrity, and availability of these assets is essential for safeguarding sensitive information, increasing efficiency, maintaining regulatory compliance, and keeping an untarnished public image. In order to achieve these goals, all employees must help the organization to secure its assets.

To increase security awareness, Miami-Dade County is interested in continuing the use of a Security Awareness Training Courses and a hosting solution. The County needs security awareness training primarily in, but not limited to the following areas; Payment Card Industry (PCI), Phishing, HIPPA, Red Flags, general employee basic and enhanced information technology Security Awareness, security awareness for Managers/Supervisors, Security Awareness for IT professionals, information privacy,



**INTERNAL SERVICES DEPARTMENT
PROCUREMENT MANAGEMENT SERVICES**

mobile data and social medial training.

In addition, Miami-Dade County should have the ability to upload in-house developed training to this system and be able to monitor/report on progress of all trainings. It has been determined by Miami-Dade County that web based security awareness training services would provide the most efficient method of delivering and managing training content and monitoring training compliance for the County's staff.

This security awareness training courses would help educate Miami-Dade County employees in critical security topics in an effort to reduce the risks of security breaches for staff and citizens of the County. Miami-Dade County places a high emphasis on protecting key personally identifiable or other sensitive information in such areas as health, finance, law enforcement and in all other areas where the individual's or organization's privacy should be protected.

Best Interest of the County / Uniqueness of Product

Please provide a detailed description as to why a waiver of formal bidding is in the County's best interest (e.g., product standardization, compatibility, proprietary access or distributorship, how vendor is uniquely qualified to provide the needed product or service, etc.). Please note that a lack of advance planning is not an acceptable justification for a non-competitive acquisition.

Miami-Dade County has been effectively using the Security Awareness eLearning Solution from inspired eLearning company for past three years. It is in Miami-Dade County's best interest to continue to use this solution as significant time and effort has already been invested on the following:

- The customization work needed to do Miami-Dade branding, inclusion of Miami-Dade policy links and acceptance forms
- Customization of course work and course tests to remove/add/edit the content to meet Miami-Dade County best practices
- Integration with employee portal to allow employees to access training without having to remember another set of username/password
- Integration work done with MDC's Reporting infrastructure to provide role based access to needed information
- Integration and access to existing LMS hosted solution provider has already been established and would need to be re-established and tested both for site to site and desktop configurations as well.
- Continuity with training program and content; many employees are in the middle of training program already. Those in mid-course will have to start the course from beginning in another system. This also eliminates the need for employees to become familiar with another training platform and differing course content.
- Some training modules, specifically HIPPA, were procured after the initial training contract was executed. These online classes would need to remain with inspired elearning, requiring ongoing hosting fees until the HIPPA modules licenses



**INTERNAL SERVICES DEPARTMENT
PROCUREMENT MANAGEMENT SERVICES**

expire and would then need to be repurchased on the new learning system (assuming HIPPA training is available through the selected vendor)

Market Research

Please describe your market research and the results thereof. This should include a description of other, similar sources or products available in the market if any and why they are not acceptable.

Although many vendors are included in the pre-qualified pool contract 8680-10, few if any offer the basic security training in combination with the PCI, HIPPA and Red Flags requirements. Many of the online training vendors offer vendor specific product security technical training or offer customized classes which do not apply to general information security best practices training.

Proposed Actions

Please describe the actions the department will take to overcome the present barriers to competition prior to any future acquisitions of this product or service.

Department Director's Approval

5/8/2014

Date Approved

613 N.W. Loop 410, Suite 530, San Antonio, TX 78216 ph: 210-579-0224 fax: 866-351-0013, www.inspiredelearning.com

Lars Schmekel
Miami Dade County
Security Awareness Training

Quote 16844C
April 15, 2014

1 Year Pricing

Quote Details:

Licenses

Site

#	Description	List	Units	Discount	Unit Price	Discount Price
1	Basic Security Awareness Solution and Monthly eNewsletter – 18 Month License (English)	\$19.95	Site License	Site License	Site License	\$64,993.00
2	Extended Security Awareness Library	\$5.99	Site License	Site License	Site License	\$19,497.00
3	"My Reports" Ad Hoc Reporting System	\$1,595.00	0	100.00%	\$0.00	Included
4	1 Dedicated Hosted iLMS Server (1 Year)	\$25,000.00	1	20%	\$20,000.00	\$20,000.00
5	Optional Course Customization (Package of 40 Hours of Customization Services. Normal Customization Cost Is \$150 Per Hour)	\$4,495.00	0	11.12%	\$3,995.00	Included
18 Month License:						\$104,490.00
18 Month License Government Discount 15%						\$ 15,873.50
18 Month License with Government Discount						\$ 88,616.50
3 Year License:						\$171,393.50
Multi Year Government Discount 15%						\$25,709.25
3 Year License with Government Discount						\$145,684.25*

*3 Year Option can be split into 3 yearly annual payments of \$48,561.42 to allow for a cost savings of \$56,867.75.

613 N.W. Loop 410, Suite 530, San Antonio, TX 78216 ph: 210-579-0224 fax: 866-351-0013, www.inspiredelearning.com

Quote Remarks

Note: Some or all of the following will apply to the options that you choose

Basic Library License Includes:

- AP-101: PhishProof Anti-Phishing Training 10 minutes
- S-101: Security Awareness Basics 50 minutes
- S-102: Advanced Security Awareness 40 minutes
- S-103: Security Awareness and Literacy 90 minutes
(S-103 is S-101 and S-102 combined into a single course.)
- S-131: Basic Security Awareness (Strongest Link) 25 minutes
- S-132: Advanced Security Awareness (Strongest Link) 20 minutes
- S-133: Basic Security Awareness (Strongest Link) 45 minutes
(S-133 is S-131 and S-132 combined into a single course.)
- S-141: Fundamentals of Information Security 30 minutes
- S-151: Rise of the Singularity 40 minutes
- S-161: Mobile Data and Devices iModule 10 minutes
- S-161: Social Media iModule 8 minutes
- Monthly issues of our Security Awareness eNewsletter for duration of the license period.

New 2014 Courses include:

- S-141 iModules
- S-111: Privileged Users
- S-161 PS - Physical Security
- S-161 WR - Working Remotely
- S-161 CS - Cloud Security

Note: With one year license, you get a choice of Human Firewall (S101-S103), Strongest Link (S131-S133), S141, or S151 supplemented with AP101 & S161 iModules. With three year license, courses listed are included.

Extended Library Includes:

- S-105: Security Awareness Refresher 25 minutes
- S-110: Security Awareness for Managers 30 minutes
- S-120: Security Awareness for IT Staff 30 minutes
- S-125: Baseline Fundamentals of Information Security For IT Professionals 60 minutes
- S-126: OWASP Top 10 Web Application Vulnerabilities 15 minutes
- S-135: Strongest Link Refresher 20 minutes
- S-155: Rise of the Singularity Refresher 20 minutes
- PCI-101: PCI Requirements for Cardholders and Supervisors 25 minutes
- PCI-120: PCI Fundamentals for IT Professionals 40 minutes
- Security Awareness screensavers (2)
- Print ready digital posters (10)

Course Hosting and Support

Standard hosting and support includes web-based course delivery, email notification for students, student tracking and reporting, online testing and certification and basic second-level technical support via email for up to five (5) points of contact at customer site with a maximum response time of 24 hours during normal office hours (9am - 6pm Central Standard US time, Monday-Friday excluding holidays). Customer's employees are to be directed to local technical support, who can escalate issues to Inspired eLearning via email as they see fit.

Optional Advanced Course Customization

Optional customization hours can be purchased at \$150/ hour or a bundle of 40 hours for \$3995. Unused customization hours at license expiration can be rolled over to renewal agreement to preserve investment.

Basic Customization (Free of Charge)

- Inclusion of your company logo in the top left corner of player window.
- Inclusion of your company logo in the Introduction page of each course.
- A link to your security policy, at the end of the course, prior to the page where students must select to

613 N.W. Loop 410, Suite 530, San Antonio, TX 78216 ph: 210-579-0224 fax: 866-351-0013, www.inspiredelearning.com

- comply or not comply with your company security policy.
- Removal of pages, quiz questions, and exam questions.
- Changing amount of available exam questions per attempt, and total number of exam attempts prior to failure.
- Setting the exam passing percentage. The default is 70%.
- Removal of audio (Voice Over).
- If you use our hosted LMS, you can quickly and easily create a customized and branded student portal.

Advanced Customization (Fee based)

- Modification of text and audio (Voice Over).
- Modification of graphics.
- Creation of new pages (Graphics, Text, Voice Over).
- Creation of new quiz and exam questions.
- Creation of new glossary entries.

MyReports ad hoc Report Writer

MyReports is an ad hoc report writer which has access to all the fields within the LMS. MyReports comes with 14 preformatted reports that can be used as is or modified to specific requirements. Reports can be built from scratch as well. Reports can be exported in many file formats such as Excel, Word, PDF, XML, HTML, and more.

SCORM/AICC Setup

SCORM setup includes professional support for installing and configuring courses on your SCORM 1.2 or 2004 compliant LMS, not to exceed 10 hours of labor. Additional hours are billed at \$150 per hour. This service is recommended for those who choose to install the course locally. Locally installed courses have a license timer which will automatically disable the course upon license expiration if not renewed.

Multi-Year Turnkey Update Support

Each subsequent year on a multi-year agreement includes annual content updates to courses, reflecting new legislative and subject matter developments, and up to 10 hours of customization work to rebrand new courses and transfer any customizations from previous year.

Localization Services

If language translations are included in the quote then the following limitations apply:
Year 1 customization is limited to 30% of slides when localizing courses, unless additional fees are paid
Years 2 and 3 of a 3-year contract receive up to 20 page modifications per language per year

Terms Net 30.



QUOTE

613 N.W. Loop 410, Suite 530, San Antonio, TX 78216 ph: 210-579-0224 fax: 866-351-0013, www.inspredelearning.com

Quote 16844C valid for a maximum of 60 days.

PO # _____ Please fax copy to 866-351-0013

Please indicate what options you want by marking the applicable check boxes:

License Duration: 1 Year or 3 Year

Include Additional Course Customization _____

Accepted by: _____ Printed name: _____

Date: _____ Title: _____

Walters, Vivian (ISD)

From: Craig, Kimberly (ISD)
Sent: Friday, June 06, 2014 1:40 PM
To: Walters, Vivian (ISD)
Subject: RQET1400008 Information Security Awareness Training
Attachments: RQET1400008 SBD Input Doc.doc; RQET1400008 DeptJustification.pdf; SecurityAwarenessTrainingServiceProviderComparison.xlsx; RQET1400008 VendorQuote.pdf

Hi Vivian,

Attached please find my input doc for RQET1400008 for Information Security Awareness Training Licensing, Maintenance and Support Services. This is the one I left you a voicemail about. It is going to be called a Legacy Agreement. If you do not have this as one of your options, then you can call it a Bid Waiver. Also, I am not entirely certain there will be an OTR. I am leaving it in for now, but it may change during negotiations. Just wanted you to know.

Attached please also find ITD's justification for a non-competitive agreement, a service provider comparison which further justifies their request for a non-competitive, and the vendor's quote.

Please let me know if you need anything else.

Kind Regards,

Kimberly Craig, Procurement Contracting Officer 1
Miami-Dade County | Internal Services Department, Procurement Management Services
111 NW 1st Street, Suite 1300 | Miami, FL 33128
p. 305.375-1443 | f. 305.375-5688
kcraig@miamidade.gov
 "Delivering Excellence Every Day" 