DEPARTMENTAL INPUT
CONTRACT/PROJECT MEASURE ANALYSIS AND RECOMMENDATION

X New   OTR   ☐ Sole Source   ☐ Bid Waiver   ☐ Emergency Previous Contract/Project No. Contract N/A

☐ Re-Bid   Other   LIVING WAGE APPLIES: NO

Requisition No./Project No.:RQET1800009__   TERM OF CONTRACT **Three (3) YEARS** WITH **Three (3)** _OTR

Requisition /Project Title: Information Security Awareness (ISA) Training, Maintenance and Support Services

Description: The purpose of this solicitation is to establish a contract for the purchase of Information Security Awareness (ISA) training, maintenance and support services in conjunction with the County's needs on an as needed when needed basis. Miami-Dade County currently utilizes Inspired e-learning to deliver Information Security Awareness training for employees and contractors and other individuals accessing the County network. Miami-Dade County is seeking competitive offers for a hosted, online e-learning solution.

Issuing Department: ITD   Contact Person: Sherry Y. Crockett Phone: 305-375-4593

Estimate Cost: $250,000   Funding Source:

ANALYSIS

Commodity Codes: 205-54			
Contract/Project History of previous purchases three (3) years			
Check here **X** if this is a new contract/purchase with no previous history.			
	EXISTING	**2ND YEAR**	**3RD YEAR**
Contractor(s):	N/A	N/A	N/A
Small Business Enterprise:			
Contract Value:			

Comments:

Continued on another page (s):   ☐ YES   ☐ NO

RECOMMENDATIONS

	Set-aside	Sub-contractor goal	Bid preference	Selection factor
SBE				

Basis of recommendation:

Signed: *Sherry Y. Crockett, CPPB*	Date sent to SBD: *February 1, 2018*
	Date returned to DPM:

SECTION 2 - SPECIAL TERMS AND CONDITIONS

2.1 PURPOSE

The purpose of this solicitation is to establish a contract for the purchase of Information Security Awareness (ISA) training, maintenance and support services in conjunction with the County's needs on an as needed when needed basis. Miami-Dade County currently utilizes Inspired e-learning to deliver Information Security Awareness training for employees and contractors and other individuals accessing the County network. Miami-Dade County is seeking competitive offers for a hosted, online e-learning solution.

2.2 TERM OF CONTRACT:

This contract shall commence on the first calendar day of the month succeeding approval of the contract by the Board of County Commissioners, or designee, unless otherwise stipulated in the Blanket Purchase Order issued by the Internal Services Department, Procurement Management Division. The contract shall remain in effect for three (3) years. The contract shall expire on the last day of the last month of the contract term.

2.3 OPTION TO RENEW

Prior to, or upon completion, of the initial term, the County shall have the option to renew this contract for three (3) additional one (1) year periods. Continuation of the Contract beyond the initial period, and any option subsequently exercised, is a County prerogative, and not a right of any Bidder. This prerogative may be exercised only when such continuation is clearly in the best interest of the County.

Should the Bidder decline the County's right to exercise the option period, the County will consider the Bidder in default which decision shall affect that Bidder's eligibility for future contracts.

2.4 METHOD OF AWARD

Award of this contract will be made to the responsive, responsible Bidder who submits an offer on all items listed in the solicitation and whose offer represents the lowest price when all items are added in the aggregate. If a Bidder fails to submit an offer on all items, its overall offer may be rejected. The County will award the total contract to a single Bidder. The County will award the total contract to a single Bidder.

If the awarded Bidder fails to perform in accordance with the terms and conditions of the contract, the awarded Bidder may be deemed in default of the contract. If the awarded Bidder defaults, the County shall have the right to negotiate with the next responsive, responsible Bidder.

2.5 PRICES

Prices shall remain firm and fixed for the term of the Contract, including any option or extension periods; however, the Contractor may offer incentive discounts to the County at any time during the Contract term, including any renewal or extension thereof.

2.6 METHOD OF PAYMENT

Award of this contract will be made to the responsive, responsible Bidder who submits an offer on all items listed in the solicitation and whose offer represents the lowest price when all items are added in the aggregate.

If a Bidder fails to submit an offer on all items, its overall offer may be rejected. The County will award the total contract to a single Bidder.

2.7 WARRANTY REQUIREMENTS: NEW LICENSE PURCHASES

A. Type of Standard Warranty Coverage Required

The awarded Bidder shall supply a copy of the manufacturer's and/or reseller's certificates of warranty at the time an order is issued. The warranty certificates shall provide a comprehensive liability of all components which are covered under the standard warranty. Under no circumstances shall the County accept a standard warranty period of less than one (1) year from the date of acceptance of the software, regardless of whether the Bidder is under contract with the County at the time of defect. Any payment by the County on behalf of the goods or services received from the Bidder does not constitute a waiver of these warranty provisions.

B. Correcting Defects Covered Under the Standard Warranty

The awarded Bidder warrants that each version of the Software will perform substantially as described in the applicable product documentation for a minimum of one (1) year from the date the County is first licensed for that version. If it does not and the County notifies the awarded Bidder within the warranty term, then, the awarded Bidder will (1) provide support of the software based on the warranty claim, or (2) replace the software at no cost to the County, or (3) if support or replacement is not practicable, refund of the license fee the County paid for the software.

SECTION 3 – TECHNICAL SPECIFICATIONS

3.0   SCOPE OF WORK

To purchase Information Security Awareness (ISA) training, maintenance and support services for Miami Dade County Information Technology Department (ITD). Miami-Dade County currently utilizes Inspired e-learning to deliver Information Security Awareness training for employees and contractors and other individuals accessing the County network. Miami-Dade County is seeking competitive offers for a hosted, online e-learning solution.

3.1   SYSTEM, SOFTWARE AND CONTENT:

System Requirements

3.1.1   The County's eLearning Solution must be hosted in the cloud and support Single Sign-On (SSO) for County users to utilize Microsoft Credentials to access the courses and test results.

3.1.2   The applications must be accessible to any County user through a variety of internet browsers – Internet Explorer and Chrome at the very least.

3.1.3   The Bidder's system uptime must be ≥ 99.9%.

3.1.4   Other system requirements:

3.1.4.1   Be SCORM compliant.

3.1.4.2   Ability for users to pause and save course progress and resume from pause point when restarting module.

3.1.4.3   Ability to provide Self-Registration for temporary, contractor or non-County employees.

3.1.4.4   Ability to easily publish Miami-Dade County internally developed SCORM compliant content.

3.1.4.5   Bids should include the Supplier's ability to host up to six (6) additional internally developed SCORM compliant courses for 30,000 employees.

3.1.4.6   Capability of analytical reporting to interface with the County's current COGNOS environment.

3.1.4.7   Provide administrative access for course development, report generation, and system configuration

3.1.4.8   Ability to customize any Security Training Awareness Course for specific audiences and roles.

3.1.4.9   Ability to assign courses by audience, role or individual

3.1.4.10   Cloud hosting environment compliant with SOC-2 requirements.

3.1.4.11   Provide integration with additional systems for recording course completion and results (e.g. API, secure CSV file transfer, electronic system-to-system file exchange).

3.1.4.12   Ability to interface with PeopleSoft eLearning module on premise or cloud base eLearning management system.

      3.1.4.13   Ability to print certificates after completion of course.

   3.1.5   The Bidder's eLearning Solution shall include the following customization options:

     ~~3.1.5.2~~3.1.5.1   Inclusion of County logo in the top left corner of player window.

     ~~3.1.5.3~~3.1.5.2   Inclusion of County logo / branding in the introduction page of each course.

     ~~3.1.5.4~~3.1.5.3   Link County security policy within the course, prior to the page where students must select to comply or not comply with security policy (Acceptance of Policy).

     ~~3.1.5.5~~3.1.5.4   Removal of pages, quiz questions and exam questions.

     ~~3.1.5.6~~3.1.5.5   Changing number of available exam questions per attempt and total number of exam attempts prior to failure.

     ~~3.1.5.7~~3.1.5.6   Setting the exam passing percentage, as required.

     ~~3.1.5.8~~3.1.5.7   Removal of audio (Voice Over).

     ~~3.1.5.9~~3.1.5.8   Maintenance of customized and branded student portal.

     ~~3.1.5.10~~3.1.5.9   Modification of text and audio (Voice Over)

     ~~3.1.5.11~~3.1.5.10 Modification of graphics

     ~~3.1.5.12~~3.1.5.11 Creation of new pages (Graphics, Text, Voice Over).

     ~~3.1.5.13~~3.1.5.12 Creation of new quiz and exam questions.

     ~~3.1.5.14~~3.1.5.13 Creation of new glossary entries.

3.2   <u>SOFTWARE LICENSES</u>

Bidder shall provide the County:

   3.2.1   Unlimited User Licenses for all courses is preferred.

      3.2.1.1   License counts for individual courses have been provided if individual course licensing is being proposed.

      3.2.1.2   If additional titles or courses are "bundled" into the offer, please indicate what additional courses are included in your offer.

3.2.2 License for the Security Awareness Library Software shall include the following:

Item Number	Security Awareness Library Course Tittle	Format	Licenses
1	Anti-Phishing Training	HTML5	30,000
2	Security Awareness Basics	HTML5	30,000
3	Advance Security Awareness	HTML5	30,000
4	Security Awareness Refresher	HTML5	30,000
5	Mobile Data and Devices Security	HTML5	30,000
6	Security Awareness for Managers	HTML5	8,000
7	Security Awareness for IT Staff	HTML5	1,200
8	OWASP Top 10 Web Application Vulnerabilities	HTML5	750
9	PCI Requirements for Cardholders and Supervisors	HTML5	5,000
10	PCI Fundamentals for IT Professionals	HTML5	1,200
11	General Privacy Basics	HTML5	30,000
12	Identity Theft Red Flags Awareness	HTML5	5,000
13	Social Media Security	HTML5	30,000
14	Social Engineering Standard	HTML5	30,000
15	Social Engineering Advance	HTML5	30,000
16	Physical Security	HTML5	10,000
17	Basic HIPAA Security Awareness	HTML5	15,000
18	Advance HIPAA Security Awareness	HTML5	15,000
19	Monthly Security Awareness eNewsletter for duration of the license period.	HTML Email	12/year
20	Security Awareness Screen Savers (2)	Digital	
21	Print ready digital posters (10)	Digital	

3.3   CONTENT REQUIRMENTS

3.3.1   The Bidder shall provide content that is engaging and interactive, utilizing a variety of instructional approaches.

3.3.2   The content must utilize a basic vocabulary and communicate effectively to all staff at a non-technical level.

3.3.3   The Bidder must demonstrate that the content will be kept current and refreshed on an annual basis.

3.3.4   Each course shall include testing and then a certificate upon completion of the course with a satisfactory score and each certificate shall include a unique identifier (such as Certificate ID) that can be tied to each individual user.

3.3.5   Content must have functionality to navigate back and forth through the training course and allow users to stop and pick up where they left off. The majority of lessons should be no more than 10 minutes in length.

3.3.6   The Bidder must demonstrate the content meets the following minimum standards:

3.3.6.1   Shareable Content Object Reference Model (SCORM) compliant

3.3.6.2 Compliant with Americans with Disability Act (ADA) and Web Accessibility Initiative (WAI-AAA) that provides capability for people with disability to take the course and complete the test.

3.3.6.3 Able to be branded for the County

3.3.7 At a minimum, course content must address the following Information Security Awareness topics:

3.3.7.1 Intro to Security Awareness

3.3.7.2 Email Security

3.3.7.3 Incident Reporting

3.3.7.4 Password Security

3.3.7.5 Anti-Phishing

3.3.7.6 Office Security

3.3.7.7 Social Networking and Engineering

3.3.7.8 Web Security

3.3.7.9 Public Wi-Fi Use

3.3.7.10 Mobile Device Security

3.3.7.11 Identity Theft

3.3.7.12 Phishing

3.3.7.13 USB Drive Threat

3.3.7.14 Acceptable Use

3.3.7.15 Safe Disposal

3.3.7.16 Information Privacy

3.3.8 Subscription to service shall also include monthly newsletters with current up-to-date topics.

3.3.8.1 The County prefers newsletters that are newly created each month as opposed to pre-made "canned" newsletters, which may not include up-to-date information.

3.4 REPORTING REQUIREMENTS

3.4.1 Generated reports within the system shall be compatible with Microsoft Excel 2007 and newer.

3.4.2 System features shall include the ability to see who viewed each specific course, whether they completed the course or not, their scores and how many attempts it took them to complete the course with a passing grade.

3.5   DATA REQUIREMENTS

3.5.1   All data collected and data transferred shall be encrypted and secured from unauthorized access (e.g. SSL encryption).

3.5.1   The County must maintain ownership of all data, databases and derived data products created, collected, manipulated or directly purchased as part of this contract.

3.5.2   ITD is the custodian of the County's data and shall determine the use, access, distribution and other conditions based on the pertinent County statutes and regulations.

3.5.3   Prior to termination of this contract, the Supplier shall transmit and return to the County all County data, databases and derived data products created, collected or manipulated as part of this contract, including all archived backups.

3.5.4   County data may not be sold to or accessed by any third-party without the County's consent. If the contract is canceled or not renewed, the Supplier must provide a copy of all data according to the specifications of the County at that time.

3.6   MAINTENANCE AND SUPPORT SERVICES

3.6.1   Support shall be inclusive of annual course content updates reflecting new legislative and subject matter developments and customizations as described in Section 3.1.5 to rebrand new courses and transfer any customizations from the previous year.

3.6.1   Bidder shall provide support services during Business Hours, consisting from 8 AM to 5 PM, Monday through Friday, except on Federal Holidays.

3.6.2   The Bidder shall provide staffing and resources to fully supply the following services:

3.6.2.1   Help Desk Services

3.6.2.2   County employees are directed to County technical support personnel, who shall escalate issues, as needed.

3.6.2.3   County technical support personnel shall create support requests online via website, Supplier portal or email.

3.6.2.3.1   Help Desk requests must be acknowledged within one (1) hour during normal business hours.

3.6.2.3.2   Help Desk requests during off hours, weekends and Federal Holidays will be acknowledged within 24 hours of resumption of normal business hours.

3.6.2.3.3   Help Desk request updates shall be provided every 24 hours until the issue is resolved.

3.6.3   Account Management Services

3.6.3.1   ITD will provide the Supplier a list of County employees and contractors for the creation, deletion or modification of user accounts.

3.6.4   Technical Support Services

3.6.4.1 Pre-launch support and testing

3.7 BACKUP AND DISASER RECOVERY SERVICES

3.7.1 Backups – The bidder shall:

3.7.1.1 Perform backups of the web server on a regular basis to safeguard against data loss. This shall include daily incremental backups and full weekly backups of all volumes of servers.

3.7.1.2 Retain daily backups for one month and weekly backups for two years on online storage.

3.7.1.3 Archive weekly backups to off-line storage media and retain for the life of the Contract. The Supplier shall provide all archived backups at the end of the Contract term.

3.7.2 Disaster Recovery – The Supplier shall:

3.7.2.1 Maintain disaster avoidance procedures designed to safeguard County data and confidential information, Supplier's processing capability and the availability of services. Supplier shall describe in its response its disaster recovery approach, including an explanation of how the data will be recoverable.

3.8 SERVICE LEVEL AGREEMENT (SLA)

3.8.1 The County, in conjunction with the selected bidder, intends to establish Service Level Agreements (SLAs) for the operations and service desk support of the Security Awareness Training SaaS solution.

3.8.2 It is important that the Offeror and the County enter into a contractual relationship that succinctly defines SLA agreements and commitments. It is the intent of this section to specifically define the minimum SLA criteria that is required by the County. The technical requirements that are presented throughout this RFP represent the County's minimum requirements. The Offeror shall detail in their Proposal its understanding of and compliance with the requirements in the RFP, including how the Offeror will comply. The Offeror shall consider carefully the resources that will be required to meet these SLAs.

3.8.3 Monthly diagnostic reports in the categories outlined below will be used to verify and analyze Offeror conformance with the defined SLAs. The County shall have access to all performance data, in raw and processed form, for the purpose of SLA verification.

3.8.4 The Offeror's Proposal shall describe how the Offeror will measure and report on each performance category below, on a monthly basis. Proposed measurement and reporting tools must be described, as well as how the County will receive the reports – e.g. via on-line access, CD-ROM, or other means.

3.8.5 Security Awareness Training SaaS Availability

3.8.6 This SLA shall address performance of the Security Awareness Training SaaS availability. The Security Awareness Training SaaS must be operational and available to customers 24 hours a day, 365 days per year. The only exception will be for pre-defined systems administration and maintenance. Individual applications may be unavailable based on the individual agency legacy application operational schedule. Scheduled downtime must be coordinated with and approved by the State with at least a seven (7) day advance notice prior to performing the scheduled downtime.

Scheduled downtime must be scheduled during off-hours. The Offeror must describe its approach and experience on availability and the scheduling of routine maintenance downtime.

3.9 SECURITY MANAGEMENT

3.9.1 The SLA shall address performance of security management. Security management includes all the components that make-up the security barriers to the application, data while being transmitted to or through the application and data available to the application. The security barriers may include firewalls, intrusion detection, virus protection, access control, authentication and other mechanism and techniques to ensure the system and data is protected.

3.9.2 Performance Monitoring and Problem Resolution

3.9.2.1 The Offeror shall describe its plans for performance monitoring and problem resolution. The Offeror shall describe procedures to be included for interfacing and consulting with software suppliers to identify and correct problems. The Contractor shall perform maintenance at times that will not adversely impact daily operations. The Contractor shall coordinate maintenance schedules and procedures based on the State's requirements. The Offeror's plans for regularly performing normal and preventive software maintenance must be included in the proposal.