

Phishing Simulations and Cybersecurity Training Solution

Request for Proposal

Issue Date: March 11, 2022

Issued By: North Penn School District
401 E. Hancock Street
Lansdale, PA 19446

Inquiries: Kristen Landis
Director of Technology
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Proposals Due: April 8, 2022
COB 4pm, EST

Section 1 INTRODUCTION

You are invited to provide a written and electronic proposal to address the district's needs to implement a phishing simulation and associated training solution to support the district's efforts for cybersecurity education. This Request for Proposal (RFP) states the overall scope of products and services desired, specific software functionality, technology foundation as well as desired Vendor qualifications. Before submitting a proposal, Vendors shall examine the specifications in order to understand all existing conditions and limitations.

1.1 ANTICIPATED TIMELINE

Listed below are projected dates and times of actions related to this Request for Proposal (RFP). There may or may not be a formal notification issued for changes in the estimated dates and times. The RFP is available online at <http://www.npenn.org/page/695>. Vendors are responsible for periodically monitoring the web site for any updates relating to this RFP.

RFP Issuance	March 11, 2022
Vendor Virtual Pre-Proposal Meeting	March 24, 2022 2:30 PM EST
Deadline for Questions	April 5, 2022 4 pm EST
Vendor Proposals Due	April 8, 2022 4 pm EST
Selection of Vendor	TBD
Contract Negotiations	TBD

1.2 PROJECT GOALS AND BACKGROUND

The North Penn School District (NPSD) educates approximately 12,800 K-12 students in a 42 square-mile area of Montgomery County, PA. NPSD operates seventeen schools and one credit recovery school and employs approximately 2,200 teachers, administrators, and support staff members.

The primary goal of the NPSD is the selection, implementation, and operation of a phishing simulation and education solution to meet the District's current and future needs in the area of cybersecurity, including simulation and training. More importantly, the District will select a Vendor who will grow with the District's needs beyond the initially defined product lifecycle.

The District's Goals Include:

- Deliver a system within budget that will serve the District well for 3 or more years
- Certify that the Vendor will support all core functionality of the product for the life of the contract
- Streamline the District's cybersecurity training
- Provide appropriate and complimentary reporting and decision support tools
- Acquire a system that operates on a platform that is scalable and efficient to manage and operate over time

1.2.1 PROJECT SCOPE

NPSD is asking for proposals to provide a phishing simulation and end-user training solution. The proposed solution must include, but not be limited to, the following components listed in section 1.2.1.1 and in Section 2.

1.2.1.1 SOFTWARE & SERVICES

- Dashboard access to any web-based services
- Phishing simulation software/services
- Training modules for end-users
- Reporting functionality
- Project management
- Software installation and/or configuration
- Training
- Ongoing support & maintenance services

1.2.1.2 DISTRICT DEMOGRAPHICS AND STATISTICS

Enrollment Information at time of RFP Publication	
Bridle Path Elementary (Grades K-6)	502
Gwyn-Nor Elementary (Grades K-6)	579
Gwynedd Square Elementary (Grades K-6)	606
Hatfield Elementary (Grades K-6)	494
Inglewood Elementary (Grades K-6)	421
Knapp Elementary (Grades K-6)	578
Kulp Elementary (Grades K-6)	589
Montgomery Elementary (Grades K-6)	662
Nash Elementary (Grades K-6)	477
North Wales Elementary (Grades K-6)	448
Oak Park Elementary (Grades K-6)	504
Walton Farm Elementary (Grades K-6)	558
York Avenue Elementary (Grades K-6)	281
Pennbrook Middle School (Grades 7-9)	838
Penndale Middle School (Grades 7-9)	1204
Pennfield Middle School (Grades 7-9)	926
North Penn High School (Grades 10-12)	3144
Northbridge School (Grades 9-12)	70
Staff Information	
Administrators	59
Teachers	996
Support Staff	843
Technology Staff	38

Current Hardware/Software Environment	
Desktop Hardware	PC Laptops, Mac Laptops and Chromebooks are supported for staff

	and students. PC Laptops are HP or Lenovo running Windows 10 and MS Office Professional Plus 2016 including AMD and Intel i3 2.2 GHz or better, Mac Laptops are running Catalina through Monterey, Intel Core i7 2.2 GHz or better. Chromebooks are Acer 738T.
Desktop Operating System	Windows 10 and Office 2016, G Suite and Chrome on Chromebooks
E-mail System	Gmail
Internet Browser	Google Chrome Safari
Existing SIS Infrastructure	
Student Information System: Infinite Campus Special Education Information System: Infinite Campus IEP Medical System: Infinite Campus Health Module	
Personnel currently using the system	Approx. 1100
System printers	Located in each school office, media centers, teacher's workrooms, and other common areas.

1.3 RESPONSE INSTRUCTIONS

The submitted proposal must follow the rules and format established within this RFP. Adherence to these rules will ensure a fair and objective analysis of all proposals. Each proposal will be prepared on the form provided, with a hard copy submitted in a sealed envelope bearing the title "Phishing Simulation and Training RFP" and an electronic copy emailed to the District contact person. Each Vendor shall be responsible for all costs incurred in order to prepare and submit their response to this RFP. To ensure a fair and objective evaluation of all proposals, Vendors are required to submit all inquiries to the project contact noted on the cover of this RFP. Vendors can submit proposals for a single solution or all solutions defined in the RFP.

1.3.1 DELIVERY OF PROPOSALS

Delivery of Proposals: RFPs must be delivered by the date/time specified and to the place stipulated on the cover of this RFP. Hard copies should be delivered to the District contact person and electronic copies emailed to the District contact person. It is the sole responsibility of the Vendor to deliver their RFP by the designated time. Any proposal received after the due date and time shall be eliminated from consideration.

1.3.2 QUESTIONS AND COMMUNICATIONS

Questions and Communications: Vendors are hereby notified not to contact any member of the Evaluation Committee, or any member of the District staff and its elected officials, except as provided herein regarding this proposal until such time as a contract has been awarded. Questions concerning any portion of this RFP shall be directed in email to the below-named individual who shall be the official point of contact for this RFP. All questions must be submitted prior to the Deadline for Questions as stated in the *Anticipated Timeline* above. Email subject must contain "Phishing Simulation and Training RFP." Failure to adhere to this policy may result in disqualification.

Dr. Kristen Landis
Director of Technology
401 E. Hancock St.
Lansdale, PA 19446
landiskc@npenn.org

1.3.3 COMPLETION OF PROPOSAL FORMS

Vendors should submit all the information and documentation requested in Section 2 (Vendor Proposal Information) of this RFP. Most subsections require a narrative description and then also have questions listed in a table format for ease of evaluation. All responses should be added to this document or submitted as a separate Word document with the subsections clearly identified.

1.4 PRICING ELIGIBILITY PERIOD

All Vendor proposals are required to be offered for a term not less than 90 calendar days in duration. A proposal may not be modified, withdrawn or canceled by the Vendor during the 90 day time period following the time and date designated for the receipt of proposals.

1.5 CONFIDENTIALITY

All documents submitted as part of the Vendor's proposal will be deemed confidential during the evaluation process. There shall be no disclosure of any Vendor's information to a competing Vendor prior to award of the contract. All applicable information will be subject to public disclosure in accordance with the Pennsylvania Right-to-Know Law, at the award of contract, cancellation of this RFP, or within 90 days, whichever shall occur first.

1.6 EVALUATION CRITERIA

The District intends to enter into a long-term relationship with a well-established Vendor whose products, features, design philosophy, support policies, and vision for schools come closest to meeting the District's needs today *and* tomorrow. The selected Vendor must be a well-established, financially stable firm committed to providing school software solutions. The ideal Vendor will have a significant installed base of school clients and a proven track record of delivering products and services on time and within budget.

The Vendor evaluation process will utilize the following approach:

- Initial Proposal Evaluation to determine Vendors selected for demonstration
- Vendor Demonstration for key stakeholders
- Reference Checks
- Site Visits with Current Clients (as needed)

1.6.1 INITIAL PROPOSAL EVALUATION

The initial evaluation will be based strictly on the Vendor's proposal response and be performed prior to any formal demonstrations, reference checking and/or site visits. Each criterion will be rated on a scale of 1-4, with 4 being the highest score. Based upon the proposal response Vendors will be evaluated against the following criteria:

- Corporate Viability & Vision
- Ability to Execute Deliverables as Outlined
- Cloud-Based Technology
- Ability to View Staff Participation at Multiple Levels
- Ease of use of software
- Ease of training module assignment by user or topic
- Services available
- Cost

FINALISTS EVALUATION

Further evaluation associated with the finalist Vendors will be performed as follows:

- Conduct Vendor demonstrations, as necessary
- Evaluate Vendor viability and vision for the education market
- Evaluate ability for Vendor to respond to district needs
- Evaluate implementation and support approach
- Evaluate functionality
- Perform reference checks and conduct site visits at the discretion of the selection committee

1.7 EVALUATION & RESERVED RIGHTS

Evaluation of the proposals is expected to be completed within 30 days after RFP closing. An evaluation team will evaluate proposals on a variety of quantitative and qualitative criteria. It is the District's intention to procure the most functionally complete and cost-effective solution from a growing, viable and financially stable company that will meet both current and future needs.

The District further reserves the right to:

- Reject any or all of the Proposals.
- Issue subsequent Requests for Proposals.
- Cancel the entire Request for Proposal.
- Remedy technical errors in the Request for Proposal process.
- Appoint evaluation committees to review Proposals.
- Seek the assistance of outside technical experts in Proposal evaluation.
- Require modifications to initial Proposals.
- Excuse technical defects in a proposal when, in its sole discretion, such excuse is beneficial

to the District.

- Investigate the qualifications of any Proposer under consideration.
- Require confirmation of information furnished by a Proposer.
- Require additional evidence of qualifications to perform the Services described in this RFP.
- Approve or disapprove of the use of particular subcontractors.
- Establish a short list of Proposers eligible for discussions after review of written Proposals.
- Negotiate with any, all, or none of the Proposers.
- Solicit best and final offers from all or some of the Proposers.
- Award a contract to one or more Proposers.
- Accept other than the lowest price offers.
- Waive informalities and irregularities in Proposals.

Inability to rank as one of the top Vendors (Initial Proposal Evaluation) will eliminate Vendors from further consideration. Failure to include in the proposal all information outlined herein may be cause for rejection of the proposal. Information and/or factors gathered during interviews, negotiations and any reference checks, and any other information or factors deemed relevant by the District, shall be utilized in the final award. The final award of a contract is subject to approval by the North Penn School District Board of Directors.

Section 2 Vendor PROPOSAL INSTRUCTIONS

Please include the following in your proposal:

Name of Company	
Software Brand Name Proposed	
Name of Primary Contact for Follow-Up Questions	
Contact Phone Number & eMail Address	

TRANSMITTAL LETTER

Please acknowledge that you have received, read and understand all aspects of the RFP and any addendum that may have been released in conjunction with the RFP. Please indicate your willingness to enter into a Not to Exceeds contract. Please provide contact information of those that are authorized to participate in contract negotiations on behalf of your company.

EXECUTIVE SUMMARY

(Section 1)

Please describe your solution and how it addresses the stated goals of the project. This should be limited to how your proposed solution will directly benefit the District and the unique value that you add. Please avoid the use of boilerplate product information.

CORPORATE OVERVIEW

(Section 2)

Vendors are required to provide a description of their company so that the District can evaluate the Vendor's stability and ability to support the commitments set forth in response to the RFP. The District, at its option, may require the Vendor to provide additional documentation to support and/or clarify requested information. The Vendor should outline the company's background including a brief description (e.g., past history, present status, future plans, company size, etc.).

Please state the year the Vendor started in the business of selling school solutions?	
How many new school contracts do you average annually?	
Please list and briefly describe any strategic partnerships you have.	
Specify the number of public sector vs. private sector clients.	
Indicate whether the business is publicly held or private.	
Indicate if the company incurred an annual operating loss in the last 5 years.	
What is the current staff turnover rate for your company?	
What is the Vendor's customer retention rate?	
What is the Vendor's percentage of annual revenues reinvested into research & development?	

PHISHING SIMULATIONS AND CYBERSECURITY TRAINING SOLUTION CRITERIA

(Section 3)

The Vendor is required to provide a response for each system criterion listed below. Please indicate whether the proposed solution(s) addresses this criterion by indicating Yes/No/Custom Quote. For all responses of Yes or Custom Quote, please include a brief narrative describing how the proposed solution meets each criterion. For a Custom Quote, please indicate the approximate additional cost for that feature.

Criterion	Yes/No/ Custom Quote	Narrative
<i>Phishing Simulation and Cybersecurity Training Solution Requirements</i>		
A1. The system must integrate well and be compatible with Google for Education / Google Portal Products		
A2. The system must be device and browser independent and must remain current with all new browser versions and new evolving technology		
A3. The system shall provide a mobile platform usable by all constituents including administrators, teachers, and students		
A4. The system shall provide data integrity and security		
A5. The system shall allow for integration with 3rd Party Applications (e.g. Custom Intuitive Data Imports/Exports)		
A6. The system shall support single sign-on for all of the Vendor's modules and integrate with Active Directory and/or Google authentication methods		
A7. The system shall provide modules that are fully integrated, eliminating the need for redundant data entry		
A8. The system shall provide updates to data in real-time across all modules included with the solution		

TECHNOLOGY

(Section 4)

The Vendor is required to provide a general description of the application program product and how it will meet requirements of this RFP.

Is the product sold on an <u>unlimited</u> user site license basis? If no, please explain.	
Is your system SOA (Service Oriented Architecture) based? Describe how your solution utilizes web services?	

Please describe your application workflow capabilities.	
Is the system fully integrated across all modules proposed so data is only entered once and can be searched throughout the system? If so, please explain how this is accomplished.	
Do the proposed applications rely on intermediary services such as Citrix or Terminal Services? If so, to what extent.	
Is the system integrated with the G Suite or MS Office Products? If so, to what extent?	
What hardware platform(s) does the Vendor's proposed application software currently operate on?	
Is the program designed for a Microsoft Server operating system?	
What database architecture does the Vendor proposed application software currently operate on?	
What client environments are supported (Windows thin client, Active-X, Macintosh, Web Browser, etc...)?	
Is the proposed application developed with a formal usability testing environment? Please provide details as to how usability is taken into consideration and the credentials of the Vendor's staff in terms of usability.	
Is the application available in a hosted or ASP model?	
Describe the disaster recovery service capabilities of the product?	

GENERAL FEATURES

(Section 5)

The Vendor is required to provide a general description of the general features of the system.

Is the proposed system distributed?	
Is the proposed system decentralized?	
Is the proposed system scalable? Please provide the smallest and largest install base.	
What is the Vendor's proposed custom report writer and does the Vendor provide a library of customizable reports? What report services does the Vendor offer? Application?	
Does the system provide role-based security?	
Does the system provide menu-based security?	
Does the system allow for data security?	

IMPLEMENTATION SERVICES

(Section 6)

Please describe the Vendor's implementation methodology.	
Does the Vendor utilize 3 rd party resources or contractors in their implementations? If so, please describe this use.	
How many PMP certified Project Managers does the Vendor currently have on staff?	
Does the Vendor offer a Production Ready approach to implementation whereby your staff will define and populate all tables and parameter files? If so please describe the approach and how you assure knowledge transfer.	
Is the Vendor willing to enter into a Not to Exceeds contract for implementation services? If not, please explain.	
Will the Vendor agree to waive all fees related to service days if we determine the services to be of unacceptable quality? If not, please explain.	

Please describe your approach and define your deliverables for the following implementation services. It is expected that your proposal includes these at a minimum.

- Project Scope Agreement
 - Project Assumptions
 - Personnel Assumptions
 - Technical Support Assumptions
 - Operational & Knowledge Transfer
 - General Project Activities and Deliverables
 - Data Conversion Process Steps and Activities
- Change Management Approach
- Communication Plan
- Quality Management and Testing
- Project Risk Management
- Schedule Management
- Resource Management
- Education Plan
- Sample Detailed Project Plan and Gantt Chart
- Timeline

SUPPORT AND SERVICES

(Section 7)

The Vendor must specify the nature, costs and conditions of any post-implementation support options including

- On-site support
- Telephone support

- Operating system and database support
- Escalation options and procedures
- Upgrade assistance
- Availability of user groups

Identify the party or business unit that is responsible for the support options provided above. Additionally, it is requested that the Vendor submit their Help Desk “prioritization” of support calls and their call “escalation procedures.”

Provide information on how server and client side software updates are received, processed and distributed to either the server and/or client environment. Describe the delivery method of future updates and product enhancements, the frequency of upgrades and if an accumulative patch process is an option. Also, describe how updates are incorporated with local custom modifications such that custom modifications will not be lost when a new release of the software is applied. The District expects to receive maintenance, as well as functional and technological enhancements as part of their Annual Support Agreement.

Does the Vendor agree to waive the first year of application maintenance fees? If not, please explain.	
Does the Vendor have a toll-free customer support line?	
Does the Vendor have regional and national User Groups?	
Does the Vendor have an Annual User Conference?	
Please list the locations of support staff that will be utilized by the District.	
What are the support hours of operation?	
Does the Vendor have a customer Advisory Board?	
Does the Vendor assign one individual to take ownership of any support issues the District may have?	
Will the Vendor provide unlimited telephone support as part of their annual support agreement? If not, please explain.	
Does the Vendor provide and maintain a searchable knowledge base of product support materials made available to its client base?	
Does the Vendor provide a customer only web site complete with documentation and software downloads?	
Will the Vendor provide all periodic enhancements and upgrades to the software at no additional charge, beyond the annual support agreement? If not, please explain.	
Has the Vendor ever required past customers to re-license their applications as a result of an upgrade or platform change?	
Does the Vendor offer a service to install and certify all updates for the District in a separate test environment?	

Vendor REFERENCE INFORMATION

(Section 8)

Provide two (2) recent clients references of similar size and requirements. Please include the following for each reference:

Client Name:	
Contact Name:	
Contact Title:	
Contact Phone Number:	
Contact e-mail address:	
Contract Date:	
Student Population:	

Client Name:	
Contact Name:	
Contact Title:	
Contact Phone Number:	
Contact e-mail address:	
Contract Date:	
Student Population:	

Additionally, please provide one (1) client reference for a district geographically close to the NPSD.

Client Name:	
Contact Name:	
Contact Title:	
Contact Phone Number:	
Contact e-mail address:	
Contract Date:	
Student Population:	

COST PROPOSAL (Please Attach a Separate Spreadsheet)

(Section 9)

Costs for the Vendor's proposed solution should be submitted as an attached spreadsheet. Costs should include the complete costs for the proposed solution. Use additional pages as needed to provide additional cost detail.

The following costs must be included in your response:

- Application software license fees
- Data conversion costs
- Modification costs if denoted to satisfy a requirement
- Implementation, Training & Consulting Services costs
- Annual software maintenance cost for five years
- Estimated Travel Costs (if applicable)
- 3rd Party Software
- Hardware (not required)

No additional charges, other than those listed on the price breakdown sheets, shall be made. All shipping and insurance costs to and from the site shall be included in this proposal. All payments to shipping agents and for insurance fees shall be made directly by the Vendor. The vendor shall be responsible for all arrangements for the shipment of equipment/software to the District's prepared site. Specific payment terms will be negotiated as part of the final contract. It is expected that certain payments will be made upon delivery of the software with additional payments made based on specific project milestones. The District may during the implementation period or thereafter require modifications, interfaces, conversion or other services from the Vendor. The Vendor agrees to provide a written Change Order describing the work to be performed and estimating the costs, including expenses, for the District's approval before any work is initiated by the Vendor. The vendor will not exceed the costs set forth in the mutually agreed to Change Orders without justification, in writing that is acceptable to the District.

AFFIDAVIT OF NON-COLLUSION

Commonwealth of Pennsylvania

Contract/Bid Title: Phishing Simulation and Cybersecurity Training

I state that I am _____ of _____
(Title) (Name of firm)

and that I am authorized to make this Affidavit on behalf of my firm, and its owners, directors, and officers. I am the person responsible in my firm for the price(s) and the amount of the bid.

I state that:

1. The price(s) and the amount of this bid have been arrived at independently and without consultation, communication or agreement with any other contractor, bidder or potential bidder.
2. Neither the price(s) nor the amount of this bid, and neither the approximate price(s) nor approximate amount of this bid, have been disclosed to any other firm or person who is a bidder or potential bidder, and they will not be disclosed before bid opening.
3. No attempt has been made or will be made to induce any firm or person to refrain from bidding on this contract, or to submit a bid higher than this bid, or to submit any intentionally high or noncompetitive bid or other form of complimentary bid.
4. The bid of my firm is made in good faith and not pursuant to any agreement or discussion with, or inducement from, any firm or person to submit a complementary or noncompetitive bid.
5. My firm its affiliates, subsidiaries, officers, directors and employees are not currently under investigation by any governmental agency and have not in the last three years been convicted or found liable for any act prohibited by State or Federal law in any jurisdiction, involving conspiracy or collusion with respect to bidding on any public contract, except as follows:

I state that _____ understands and acknowledges that
(Name of my firm)

the above representations are material and important, and will be relied on by the North Penn School District in awarding the contract(s) for which the bid is submitted. I understand and my firm understands that any misstatement in this Affidavit is and shall be treated as fraudulent concealment from North Penn School District of the true facts relating to the submission of bids for this contract.

(Name and Company Position)

SWORN TO AND SUBSCRIBED BEFORE ME THIS _____ DAY OF _____, 20

Notary Public

My Commission Expires

PROPOSAL SIGNATURE FORM

(Section 11)

The undersigned, as proposal responder, declares that he/she has carefully examined all the items of the Specifications and Instructions herein that he/she fully understands and accepts the requirements of the same, and he/she agrees to furnish the specified items and will accept, in full payment therefore, the amount specified below.

Proposals shall include installation services, and the successful respondent shall obtain all required permits and pay fees required.

Firm Name: _____

Date: _____

Address: _____

Telephone: _____

Signature: _____

(Person executing response & official capacity)