



**Finance
Procurement Services**

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P.O. BOX 550 • Raleigh, NC 27602

To: All Bidders

From: Tom Wester – Procurement Services

Date: October 5th, 2009

RE: Request for Proposal #09-103

Security Awareness Training Web Portal Services

Wake County ("The County") is seeking proposals from qualified firms for providing the services for a Web based security awareness training portal.

Project Schedule:

- | | |
|---|---------------------|
| • Bid package issue | Oct 05, 2009 |
| • Questions due to Wake County via E-mail | Oct 12, 2009 |
| • Response to questions returned to bidders | Oct 15, 2009 |
| • All bids to Wake County by 2:00 p.m. EDT | Oct 23, 2009 |
| • Tentative award date | Oct 28, 2009 |
| • Training Solution is online and training begins | Dec 1, 2009 |

Bidding Instructions:

Deliver one (1) signed original, and two complete (2) copies of the bid to the person and address listed below in a sealed package. Make sure that all items detailed in the Project Specifications section are included. The sealed package shall have the Company Name, Project Name and Bid Number clearly marked on the front of the sealed envelope. Bids packages are to be delivered to:

Mr. **Tom Wester**, CLGPO
Wake County Procurement Services
Wake County Office Bldg – Rm 926
337 S. Salisbury Street (27601)
PO Box 550 (27602)
Raleigh, NC

Sealed bids will be received at the above address until **October 23, 2009 at 2:00 p.m. EDT** for furnishing and delivering the service as described herein. Bids must be submitted in a sealed package with the bid signed and dated. Failure to return a signed execution of bid shall result in disqualification. Bids will not be accepted by electronic and/or facsimile means. Late

responses, regardless of delivery means, will not be accepted.

The County reserves the right to reject any and all bids and to make the award as it deems in the best interest of the County.

Project Specifications

Background/Objective

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, Wake County is interested in acquiring web hosting services which includes training content that would provide the County with a complete World Wide Web accessible security awareness training portal ("Web Portal"). The County needs security awareness training in the areas of, but not limited to, HIPAA, PCI, and basic information technology Security Awareness Training. It has been determined by Wake 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 Wake County staff and its agencies.

This security awareness training web portal service would help educate Wake County employees and its agencies in critical security topics in an effort to reduce the risks of security breaches for staff and citizens of Wake County. Wake 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.

Written Agreement

The selected proposer shall be required to enter into a written agreement, which must be approved by the County's Information Services, Procurement Department and the Legal Department.

Signature on the Bid Acknowledgement form section shall serve as an acceptance that the proposer is willing to enter into an agreement with the County if their bid is accepted.

Evaluation Criteria and Contract Award

The County shall evaluate and select proposers to provide the required equipment and services based on the completed responses. The County shall be the sole judge in determining how the evaluation process shall be conducted and what vendor shall be considered for award as deemed to be in the best interest of the County.

The County may conduct such investigations as the County considers necessary to assist in the evaluation of any bid to establish responsibility, qualifications and financial ability of any potential

vendor to perform the services specified under this bid within the desired timeframe as outlined in the project schedule. The evaluation criteria noted below are the criteria to be used for evaluation of responses to this bid.

Evaluation Criteria

- Adequacy and completeness of response
- Breadth and depth of training content
- Methods of presenting the training and quality of the user interfaces
- References
- Pricing

Preparation of Bids

The Bid Acknowledgement form must be signed by a company representative authorized to bind the offer.

Interpretations, Discrepancies, and Omissions

Should any proposer find discrepancies, omissions or ambiguities in this bid the proposer must at once request in writing an interpretation from the proposal contact (Tom Wester) listed on the bid cover page. All questions submitted must be in writing. The deadline for submitting questions is **Monday, Oct 12, 2009** at 12:00pm EDT. All questions will be answered to the extent possible in the form of addenda to the specifications. All written requests for clarification should be addressed to the attention of Tom Wester and sent to: twester@co.wake.nc.us.

Failure to request an interpretation will be considered evidence that the Proposer understands the provision of the bid document

The issuance of a written addendum is the only official method by which interpretation, clarification or additional information will be given by the County. Only questions answered by formal written addenda will be binding. Oral and other interpretations or clarification will be without legal effect.

Cost of Developing Bid Response

All costs related to the preparation of responses and any related activities are the sole responsibility of the proposer. The County assumes no liability for any costs incurred by proposers throughout the entire selection process.

Proposal Ownership

All bids, including attachments, supplementary materials, addenda, etc. shall become the property of the County and will not be returned to the proposer.

Mandatory Project Specifications

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

- 1- The web portal must contain content that adequately covers security awareness training subjects for the Payment Card Industry standards.
- 2- The web portal must contain content that adequately covers security awareness training for the Health Insurance Portability and Accountability Act of 1996.
- 3- The web portal must contain content that adequately covers security awareness training for the collection, use and disclosure of personal information in a manner that recognizes both the right of an individual to have his or her personal information protected and the need of Wake County to collect, use or disclose personal information for purposes that are reasonable.
- 4- The web portal must contain content that adequately covers basic information security concepts such as, but not limited to, protection of system passwords, social engineering, phishing, appropriate e-mail content, the use of secure websites, and the protection of personally identifiable information.
- 5- The web portal must support current and future versions of industry standard web browsers such as Internet Explorer and Mozilla Firefox.
- 6- The web portal must contain a variety of reports to include tracking of training status by staff, lists of available content, and the date that the training content was updated. This detailed information will be able to be reported on by department level or user level. This reporting data must include the ability to be exported to common file formats such as CSV, Excel, XML or Adobe PDF. This reporting mechanism will support roles based authority to allow the County to delegate reporting functions to respective department managers. Staff members and department managers must have the ability to print out proof of completion.
- 7- The web portal must contain the ability to setup periodic training schedules, and training completion deadlines.
- 8- The web portal must have the ability to import users with the directory services of Lotus Notes and/or Microsoft Active Directory to aid in the population of users within the training solution. Please describe the method used to import and maintain the user list.
- 9- Please include a description of the system admin function, and list the primary functions that are accessible.
- 10- The web portal vendor will generate all emails to users informing them of required training courses.
- 11- The web portal vendor will provide a Web experience that is similar to the Wake County Web site; this includes site appearance and site response speed.

- 12- The web portal training solution will allow Wake County to submit customized training content as needed. This training content will be added to the appropriate web portal training courses in a timely manner.
- 13- The web portal vendor will keep all training content current with all applicable Federal and State regulations.
- 14- The training content must be SCORM compliant.
- 15- The portal must be organized in such a way as to support roles based content.
Example: Employees that handle medical information would only see HIPAA security training and basic security awareness training courses or modules.
- 16- The web portal will be hosted by the vendor or by an agent thereof. An appropriate web hosting service level agreement must be submitted with vendor proposal, and must state the service level in areas of system measurements such as, but not limited to:
 - i. Standard web hosting system uptime metrics including total course content and reporting availability
 - ii. System speed/response time metrics
 - iii. Guaranteed implementation time to incorporate Wake County contributed course content
 - iv. List of the primary security controls and other methods/procedures that the vendor will leverage to protect the Wake County user and email lists from being lost or stolen.

Optional Project Specifications

- 1- Modern web based presentation mechanisms such as, but not limited to, Adobe Flash, Microsoft Active X or Java should be used.
- 2- The web based training solution should be Section 508 compliant to aid in the training for the disabled.
- 3- The complete course content should be able to be purchased and transferred to the Wake County owned, SCORM compliant, Meridian learning management system at some time in the future, if so desired by the County.

Reference: <http://www.meridianksi.com/>

Bid Response Requirements

For this section, vendors are required to provide detailed written responses to the following items. The responses shall be considered technical offers of what vendors propose to provide and shall be incorporated in the contract award as deemed appropriate by the County. Using company letterhead, please attach your responses to these questions to the last page of the enclosed Bid Acknowledgement form. Failure of vendors to respond to any of the following technical submittal requirements may be grounds for considering a proposal non-responsive.

1. A cover letter stating the name, address and telephone number of the proposing vendor. This letter must bear the signature of the person having the authority to make the proposal for the firm.
2. Response to all items in the Project Specifications section.
3. Executed Bid Acknowledgement form.
4. A list of at least three references, preferably public entities, for which you have performed similar services. The list should include a summary and timetable of services provided, as well as a specific contact person at each organization.
5. Cost and Pricing:
 - i. One time fees including, but not limited to, setup fees and web site customizations
 - ii. Annual maintenance fee
 - iii. Course customization fees
6. Any other information deemed necessary by the proposing vendor.

Bid Acknowledgement:

Company Name: _____

Address: _____

Person Authorized to Sign Bids: _____ (print)

Signature: _____

Phone: _____ Fax: _____