

# CUSTOMER NAME

## Security Awareness Education

### Request for Proposal

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*Program Content & Hosting Services*

*Date*

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## SAE PROJECT OVERVIEW

CUSTOMER is seeking the services of a qualified provider of Security Awareness Education (SAE) content and learner hosting. These services will be required to start with planning and preparations on DATE, YEAR followed by launch of the program on DATE, YEAR with planned completion by no later than DATE, YEAR. CUSTOMER is requesting proposal from qualified SAE vendors that will help CUSTOMER fulfill security awareness education requirements stipulated by COMPLIANCE FRAMEWORK. Vendors will effectively deliver three essential capabilities:

CONTENT	Provide relevant and current security awareness education content that targets all identified audiences in scope for security awareness compliance training
CUSTOMIZATION	Provide the ability to customize content to meet the specific SAE needs of CUSTOMER and/ or to brand the content for CUSTOMER's internal use
HOSTING	Host all learners in a cloud service that delivers the content over the web, tracks learner activity and reports learner completion

## SAE VENDOR QUALIFICATIONS

The successful SAE vendor will:

- Have experience delivering SAE to large, geographically dispersed and multi-role audiences
- Assign a project team that is led and managed by a qualified adult education expert
- Experience designing and delivering classroom-based and web-based adult education. \*<sup>1</sup>
- Offer any combination of the essential services (CONTENT, CUSTOMIZATION, HOSTING)
- Have experience developing and delivering compliance-driven awareness training programs
- Modular content / structured content development approach
- Multi-language content and easy localization both content and hosting application

## PROJECT MILESTONES

Milestone	Date
Distribute RFP to vendors	
Email confirmation of vendors intent to bid	
Questions from vendors about RFP, scope or approach	
Responses to vendors questions about RFP, scope or approach	
Submission of vendors proposal	
Target date for review completion of accepted proposals	
Final vendor selection and vendor notification	
Vendor selection response	
Contract negotiation process completion	
Target date for program planning kickoff	

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<sup>1</sup> Note CUSTOMER reserves the right to interview any of the assigned members of the consultant's project team before the consultant is selected.

## CUSTOMER SAE REQUIREMENTS

### CUSTOMER BACKGROUND

- INSERT CUSTOMER BACKGROUND TEXT
- LIST THE TARGET AUDIENCE(S) IN SCOPE FOR THE TRAINING AND THE NUMBER OF EMPLOYEES PER GROUP
- INDICATE ANY PREFERENCES FOR PRICING MODELS (PERPETUAL/SUBSCRIPTION)
- INDICATE ANY PREFERENCES FOR HOSTING CAPABILITIES
- INDICATE ANY COMPLIANCE FRAMEWORKS / DEADLINES THAT AFFECT THE SCOPE FO THE PROGRAM

### DELIVERABLES

The following is a list of service deliverables to be provided by the vendor during the service engagement:

- SAE content packaged for publication to any SCORM 1.2 compliant Learning Management System (LMS)
- Hosted LMS that can support CUSTOMERS learners around the globe, around the clock
- Simple to use bulk load method for uploading users the hosted LMS
- Customizable learner notification templates
- Subscription and perpetual pricing models
- Content customization tools that facilitate CUSTOMER edits and modifications to the content
- Program support materials such as print-based content pamphlets, posters, and email templates

## INSTRUCTIONS AND GENERAL INFORMATION

SAE vendors are required to provide project based firm fixed pricing to receive consideration. CUSTOMER must receive vendor's signed bid and "Statement of Work" (SOW) no later than DATE. Submission should be submitted via email in Microsoft Word or Adobe PDF format.

## TERMS AND CONDITIONS

This Request for Proposal (RFP) is not an offer to contract, but rather an attempt to establish a common framework within which an agreement may be reached. This RFP constitutes only an expression of interest and does not constitute a binding agreement between the parties to consummate the transactions contemplated herein, and the terms hereof shall not be deemed an offer or an agreement to negotiate. CUSTOMER may terminate discussions at any time. Notwithstanding any past, present or future written or oral indications of assent or indications of results of negotiation or agreement to some or all matters then under negotiation, it is agreed CUSTOMER will not be under any legal obligation unless and until definitive agreements embodying the terms and conditions outlined in this RFP.

The SAE vendor's response to this RFP and other customary terms and conditions mutually agreeable to the parties have been executed and delivered by all parties intended to be bound. No reliance, performance, change or loss of position, or other action or expectation now or hereafter made or incurred based upon any of the provisions contained herein, whether or not at the request or urging of the other party, shall be deemed to create any obligation or agreement of any type.

By receipt of this RFP, the SAE vendor hereby acknowledges and agrees that participation in this proposed project and any statements regarding such project made by CUSTOMER or its respective officers, directors or employees do not constitute an assurance, representation or warranty of any kind, express or implied, as to the suitability (commercially or otherwise) or profitability of the project for any purpose.

Responses submitted by a SAE vendor to this RFP represent a firm offer to contract on terms and conditions described in the SAE Company's response. This RFP and the response to this RFP shall become part of the definitive agreements. All costs incurred by the SAE vendor in the preparation of the response shall be the responsibility of the SAE vendor. CUSTOMER reserves the right to reject any and all bids and waive any minor irregularities.

All data and information contained in the vendor's response to this RFP shall be deemed to be non-proprietary unless specific items in which proprietary interest is claimed are clearly marked and an agreement has been entered into. All supporting documentation submitted by the SAE vendor shall become the property of CUSTOMER unless the SAE vendor specifically requests in writing that the documentation be returned. Title to all plans, drawings, specifications, ideas, concepts, models or other tangible work product produced specifically for this project by the SAE vendor pursuant hereto shall remain with CUSTOMER

## METHOD OF PROCUREMENT

CUSTOMER reserves the right to reject any and all Proposals, whether solicited or unsolicited, or to negotiate separately with any source whatsoever in any manner deemed necessary to serve the best interest of CUSTOMER. This right includes the type of contract to be awarded. CUSTOMER reserves the right to waive informalities and minor irregularities in proposals received and to accept any portion of a proposal or all items bid if deemed in the best interest of CUSTOMER to do so.

There exists no automatic right for the vendor to submit revisions to the vendor's original Proposal; however, CUSTOMER may, at its discretion, accept or reject any such revision. Although CUSTOMER reserves the right to question the vendor concerning the proposal, CUSTOMER may, at its sole discretion, award a contract without soliciting additional information or clarification from the respondents to this RFP.

CUSTOMER reserves the right to make awards in any way it deems advisable in its best interest. The lowest priced bid package may not necessarily be the package chosen and CUSTOMER reserves the right to select the SAE vendor, or combination of SAE vendors, that it, in its sole opinion determines to best meet the overall needs of CUSTOMER. Payment for goods and services shall be made on a scheduled basis tied to specific deliverables or milestones as agreed to by CUSTOMER and SAE vendor in the definitive agreement.

## PROPOSAL SUBMISSION

Obtaining consistent information from all SAE vendors is essential if the evaluation criteria established by CUSTOMER are to be consistently and systematically applied in the assessment of all proposed systems. For that reason, SAE vendors are requested to submit their proposal in the format detailed in the next section of the RFP.

SAE vendors must explicitly state in their proposal the terms and conditions under which contracts for services may be terminated. Each proposal shall include a letter of transmittal, which bears the signature of an authorized representative of the SAE vendor company. The letter of transmittal must also include the name(s) of the individual(s) authorized to negotiate with CUSTOMER, as well as the names of sales representatives of the vendor.

SAE vendors first must email their signed response in PDF or Word format to:

CUSTOMER  
CONTACT NAME  
CONTACT INFO

When a SAE vendor has been selected and a final "Statement of Work" has been agreed upon, please submit a copy of the FINAL proposal and documentation to the address above.

## DETAILED RESPONSE REQUIREMENTS

The SAE vendor's proposal in response to this RFP is required to include the following sections:

### **1.0 EXECUTIVE SUMMARY**

- 1.1 This section should present a high-level synopsis of the SAE vendor's responses to the RFP. This includes its understanding of CUSTOMER's SAE goals.
- 1.2 The Executive Summary should only comprise of 1-2 pages and is a brief overview of the deliverables and milestones of project.
- 1.3 The summary should convey the main features and benefits of the proposed solution.

### **2.0 VENDOR EXPERIENCE AND QUALIFICATIONS**

- 2.1 Provide a statement of vendors qualifications to complete the project.
- 2.2 Provide background biographies of the team members expected to work with CUSTOMER on this assessment.
- 2.3 List the specific roles each of these team members.

### **3.0 SOLUTION OVERVIEW**

- 3.1 Describe of the security awareness education content and its applicability to meet the learning needs of the listed target audiences and prescribed compliance frameworks (PCI, HIPAA, Data Privacy, etc)
- 3.2 Describe content customization options including CUSTOMERS ability to customize content
- 3.3 Describe the hosting service (learning management system), the learner capacity, scalability, minimum requirements and compliance with SCORM
- 3.4 Describe the methods for loading users into the system
- 3.5 Describe the method for notifying users of their enrollment and their login procedures
- 3.6 Describe methods for CUSTOMER to update, modify, remove users from the system
- 3.7 Describe CUSTOMERS audit and reporting tools and capability
- 3.8 Describe annual learner reset process / methodology
- 3.9 Describe learner support and service level agreements

### **4.0 PROJECT MANAGEMENT**

- 4.1 Include the method and approach used to manage the overall project and client correspondence.
- 4.2 Briefly describe how the engagement proceeds from beginning to end including vendor's project management style, deliverables management, scheduling management, reporting, SAE team structure.

### **5.0 DETAILED AND ITEMIZED PRICING**

- 5.1 Include a fee breakdown by project deliverable
- 5.2 Provide hourly rates, by resource type, to be used if additional work is required.
- 5.3 Provide a project timetable
- 5.4 Provide an area to accommodate signatures of both parties

### **6.0 REFERENCES**

- 6.1 Provide three current references that can be contacted for which the vendor has performed similar services.

## EVALUATION FACTORS / AWARD CRITERIA

Any award to be made pursuant to this RFP will be based upon the proposal with appropriate consideration given to operational, technical, cost, and management requirements. Evaluation of offers will be based upon the SAE vendor's responsiveness to the RFP and the total price quoted for all items covered by the RFP. The following elements will be the primary considerations in evaluating all submitted proposals:

1. Completion of all required responses contained within this RFP in the correct format as requested.
2. The extent to which SAE vendor's proposed statement of work fulfills CUSTOMER's stated requirements as set out in this RFP.
3. An assessment of the SAE vendor's ability to deliver the indicated service in accordance with the specifications set out in this RFP.
4. The SAE vendor's stability, experiences, and record of past performance in delivering such services.
5. Availability of sufficient high quality SAE vendor personnel with the required skills and experience for the specific approach proposed.
6. Overall cost of SAE vendor's proposal.
7. Scores and responses to questions asked both during interviews and submitted questionnaires.
8. CUSTOMER, may, at their discretion and without explanation to the prospective SAE vendors, at any time choose to discontinue this RFP without obligation to such prospective SAE vendors