CAMP Identity Management Workshop
Semantics, Contracts, and Features: Leading an RFP Process

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Date: Tuesday, November 16, 2004 at 1:00 p.m. - 2:15 p.m.

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Discussion

I. Gather your requirements
   a. One suggestion one can use to determine requirements was to hold focus
groups. These focus groups can help you to determine what is currently
done on your campus, what is wanted and what may be deemed “broken”.
b. It could also be useful to talk to various departments as well.
c. Perhaps develop a scoring model to determine what is needed over what is
   wanted. Keith Hazelton from Wisconsin has a useful scoring model that
can be used outright or as a starting point.

II. Vendors
   a. It would be useful to interview multiple vendors to determine how their
      system(s) can work within your architecture.
b. It may difficult to interview one person when looking at an open source
      solution. One way to help this problem would be to find an advocate for
      open source.
c. Vendors often speak of features that may or may not exist in their
      products. It is rather important to pin them down to specifics.
d. What should someone ask to evaluate a vendor’s product, including an
   open source solution?
      i. What kind of support can be expected?
      ii. How much does the solution cost? Are upgrades included in the
          cost?
      iii. Are any benchmarking or performance statistics available for the
           product(s)?
      iv. How complex is the solution? Is it easy to install and maintain?
          Can it be modified to fit your specific needs?
      v. How dependent will your organization be on the vendor’s
         product/solution and thus, the vendor?

III. Where do the technical people/technology fit in the process?
   a. They have an important role to make recommendations early on and to
      evaluate responses and results that come out throughout the process.
b. It could be useful to create an architect position to be the voice of the
   technical folk.
c. At one university the technical folk did not lead the effort, but were
   involved in writing the RFP.
IV. An Identity Management System has many components, where should the focus be?
   a. Try to break the system into small pieces so it will be easier to focus an RFP. It may be necessary to have multiple RFPs, one for each component.
   b. The components may include:
      i. Password Synchronization/Fewer or Reduced Sign-on
      ii. Web Initial Sign-on System
      iii. Business Logic/Processes
      iv. Integration with existing systems and migration to the new systems.

V. Lessons Learned by those who have gone through an RFP process.
   a. Make sure the list of requirements can actually be met (i.e., start small).
   b. Keep an eye on your vendors to see how much work they have to do to integrate with your systems. This will help you determine how much work you will have to do.
   c. Define your environment well so vendors have less “wiggle” room.
   d. The process can let you discover a lot about your own organization.
      i. Where your organization wants to go.
      ii. If there is a divide between those who prefer payware and those who prefer open source solutions.
      iii. Can change the perception that central IT makes wide reaching decisions without input from the organization.
   e. The process can bring disparate groups together.
   f. The process can get useful test/dev environments put into place.
   g. The process takes you off the “stealth” path in a big way.