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**REQUEST FOR PROPOSALS # 07-14  
Events Management Solution  
University of Southern Maine  
ADDENDUM #1**

This addendum responds to questions submitted by vendors.

The University of Maine

University of Maine  
at Augusta

University of Maine  
at Farmington

University of Maine  
at Fort Kent

University of Maine  
at Machias

University of Maine  
at Presque Isle

University of  
Southern Maine

- Q1. How do we identify items in the RFP that may be an issue? For example, our legal team advised we can't agree to ALL of the terms and conditions in Section 2 and perhaps even some listed in Attachment A. Because the RFP is in PDF form, I'm curious if those items are at all negotiable. If they are, how would you like us to respond?
- A1. Paragraph 1.12 instructs bidders: Proposal Understanding: Any exceptions should be noted in your response. We haven't had many express concerns about how to identify exceptions. The most common and acceptable method is to identify the offending paragraph i.e. 2.16 Indemnification and then explain your concern about specific language, the whole paragraph, etc. You can also offer alternative language. The terms and conditions may be discussed - hence the reason we included paragraph 1.12. If your legal team is seeking a copy of the RFP in MS Word format. You may request a copy. However, the University expects any modifications be clearly identified.
- Q2. The email announcing RFP 07-14 stated: "If you have any questions about this email or its RFP please feel free to contact me. The deadline for vendor inquiries is 5:00 p.m., October 24, 2013. The University will respond to written inquiries not later than October 30, 2013"
- A2. The dates for Q&A shown in the email were incorrect. The dates shown in the RFP at paragraph 1.6 are correct. The deadline for written (email is acceptable) inquiries is October 28, 2013. The University will respond to written inquiries not later than close of business November 1, 2013.
- Q3. Can we please have the RFP in a Word Version?
- A3. Upon request a MS Word version of the RFP will be provided.
- Q4. Is there a defined budget for this initiative? (Y/N is ok)
- A4. Yes, there is a defined budget. We will not discuss the numbers.

- Q5. What are the limitations of the current processes / technology related to meeting planning that are of primary interest for you to solve?
- A5. Currently, we have a home grown registration software application. We do not have full service event management software that meets all our needs.
- Q6. Who are the key decision makers / roles on the RFP? Is there executive sponsorship for this initiative?
- A6. Our committee is made up of seasoned conference planners and an IT expert. The Executive Director of University Outreach is the executive sponsor.
- Q7. How many meetings do the NRC and CS manage annually? How many registrants attend per year?
- A7. 450+ meetings per year. 3000 +- registrants.
- Q8. What thresholds define which meetings are centrally managed? What types of meetings do CS and NRC NOT centrally manage, and how are those typically managed?
- A8. All external meetings and events are centrally managed by CS.
- Q9. Are all meetings held at University facilities or does CS also facilitate securing meeting space (or sleeping rooms) at nearby hotels?
- A9. Both on and off campus at hotels nationwide.
- Q10. Are the NRC events held at the University's facilities?
- A10. No, they are not.
- Q11. Do any of the NRC and CS meetings require attendees to travel? Does CS work with a preferred travel agency or an online booking tool?
- A11. Yes, they do require travel. No, CS currently manages.
- Q12. Does CS have a meeting card in place for purchasing goods and services?
- A12. Yes, if that means a purchasing card.
- Q13. What international language support is the University interested in – is this required for meeting planners and/or meeting attendees?
- A13. Not required. Although, we do need to capture international addresses and registrations from registrants all over the world.
- Q14. What CRM is the University currently using? How is that information utilized/leveraged for events that NRC and CS manage? Is it connected to the current registration system?
- A14. Currently, not using one.
- Q15. Are all the meeting planners who will be trained US based?
- A15. Yes.

Q16. 1.40 – Can you please clarify a couple of the reporting elements: marketing reports, Track work orders and client communication means?

A16. Marketing reports example: We need the ability to pull email and mail lists for clients and vendors so we can send follow-up emails, mailings, etc. We also need the ability to see the effectiveness of these communications.

Track work orders: We want to see a record of all internal and external service orders/correspondence.

Client communications: We would like to see all email exchanges associated with a group/individual.

Q17. 2.20 – Is there one PO for all the events or is NRC and CS executing PO's separately?

A17. Separately.

Q18. 3.2.1 – Can University clarify "company profiles?"

A18. Company profiles consist of full contact information and a record of the business they have done with us.

Q19. 3.2.2 – Can University provide further explanation of the desired process / examples.

A19. We want to know how each system tracks the event management process.

1. Response to RFPs.
2. Negotiations.
3. Contracts.
4. Event planning process.
5. Wrap up and billing.

Q20. 3.2.3 – Can University provide further explanation of the desired process / examples.

A20. See our response to Q19, above.

Q21. 3.3.1 –Please clarify "room reservation requests." Does this refer to meeting space or sleeping rooms for the event? Is meeting space University property or external (i.e. hotel conference rooms, etc.).

A21. We are referring to meeting space. Meeting space is BOTH university and external.

Q22. 3.3.3 – Please define "contact hours, CEUs, CLEs, CMEs" and provide further explanation of the desired process / examples of workflow?

A22. Continuing Credit hours required for certain professions (teachers, lawyers, medical, etc) that can be gained by attendance at conferences.

Q23. 3.6.4 and 3.6.6- Can you please explain the workflow or process for your Shibboleth/ CAS/ Identity Management System?

A23. We are not sure what you mean by workflow or process, but CAS and Shibboleth are the two options for authenticating a hosted system. Some attribute information may be available via openLDAP (but not authentication for a hosted system). We use a federated approach to SSO and our preference is Shibboleth via an InCommon partnership.

Q24. How many total staff users? Examples of various roles: General Users; System Administrators; Admissions Counselors; Student Workers.

A24. Approximately five at this time to include meeting planners, marketing, and administrative staff.

Q25. What is the current Single Sign on process for Identity Management? Is there a preferred method? Does the University of Maine System use a Delegated or Federated approach to SSO?

A25. Federated. CAS and Shibboleth are the two options for authenticating a hosted system. Our preference is Shibboleth via an InCommon partnership.

Q26. Another RFP was recently released for CRM. There is a section in that RFP for CRM related to Event Management. Why does USM want to separate this Event Management from the Enrollment CRM? Is the plan to roll this out to more units than the CRM?

A26. It was an internal decision to roll these out separately and we will not comment further at this time.



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Hal Wells  
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November 1, 2013