

**University of Maine System
Core Management Facility Software - RFP# 2018-70
ADDENDUM #01**

QUESTIONS

1. As it pertains to Rider B-2, are we permitted to use (provide) our own standard W-9 as a valid response?

ANSWER: YES

2. Within Appendix C, General Instruction 6.: a reference is made to “additional options or services that are not included in the offering”. Within one of our module offerings, Interlock, a physical power controlling box and/or a server are required and subsequently provided by a third party vendor. These vary based on the chosen set up by the University of Maine (e.g. if all the instruments are in one room or spread out over several) and costs will respectively vary based on these decisions made.
 - We want to ensure we are providing you with all relevant pricing per the RFP mandate(s), however, scoping the best interlock solution typically requires consultative conversations between us and our client(s) which are directly related to the total amount ultimately financially incurred by the institution.
Q: Are you able to provide an approximation as to how many of your facilities will be interested in Interlock and the projected # of interlock network boxes required so we can provide our best estimate (which may be subject to change based on actual conversations which will transpire after contract signage)? If so, would you please provide?

ANSWER: Specific CORE solutions requiring hardware interlocks are yet to be identified. The vendor should describe the various hardware interlock options available and typical pricing for those solutions, recognizing service related fees for installation would be estimates only and not binding.

3. As it pertains to Rider A, Performance Terms and Conditions, 3. Campus Visits: the University of Maine will be assigned an iLab Project Manager (as well as other applicable resources), and in most cases (referencing our experience with approximately 175 institutions) is able to succinctly complete all relevant implementation processes via a “best of breed” web-based manner.
Q1: If the University of Maine is interested in our onsite services (which come with an associated daily cost and are completely optional), should we include that in our proposal so that you are aware?

ANSWER: Given the RFP doesn't differentiate on campus service versus online or by phone service, the vendor should identify when and under what conditions on campus service may be preferred by the customer.

Q2: If so, would you please indicate where the most logical place to insert this auxiliary information is within the confines of our bid submittal?

ANSWER: This should be co-nested with the description of services available to support implementation in the vendor's proposal.

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4. As it pertains to Exhibit E, Rider D: Our projects are historically staffed monthly (based on contract signage for that particular month). Therefore, the ability to list a specific Project Manager (and other to-be-determined resources) to the University of Maine is likely not feasible at this time.
- Q:** As these assignees will likely occur during the “contracting phase”, would it be acceptable to provide assigned resources at the time of contract agreement/prior to the commencement of implementation?

ANSWER: Appendix E, Rider D, Services Engagement Form is a form that is used to manage the executed contract. Refer to Section 1 of the Contract provided in Appendix E.

5. As it pertains to Appendix E: there are several sections within your provided boilerplate that are Software-as-a-Service (SaaS) friendly.
- Q1:** Our legal team is currently reviewing, however, in the case that our legal take issue with any of the provided terms, where and how should we provide associated redlines (as/if applicable)?

ANSWER: Please refer to RFP language 1.2 and 3.2 for instructions.

Q2: Additionally, where should we provide proposed content we’d want to add in to more accurately reflect the service offering?

- If valuable to those reviewing our bid response, we’re more than happy to provide our standard template for your review. However, we want to be weary of 3.1.4 – Additional Attachments Prohibited.

ANSWER: Please refer to RFP language 1.2 and 3.2 for instructions. Responses must include any changes proposed to the University’s Contract provided in Appendix E. Keep in mind the instructions in Section 1.2 of the RFP provide guidance on what we will accept for adjustments and that this part of the response is scored.

6. As it pertains to Appendix G, Evaluation Question 7: Our team is currently 100 people supporting 175 institutions. At the time of contract signature we identify a Project Manager and cascading team (we plan to represent these roles within our RFP response). As we will not have staffed the project, we cannot reasonably provide resumes for the team members assigned to UMaine at this juncture.

Q: Would including a more overarching background of existing personnel in these roles allow you to still evaluate the team and ultimately suffice as a valid response here?

- If it would prove beneficial, you are more than welcome to conduct an assessment of any associated project manager(s) affixed to our provided institutional references.

ANSWER: In lieu of resumes for specific team members, describing position titles and skill requirements for each position would be helpful for consideration.

7. As it pertains to Appendix C: It is a bit difficult to “size” the scope of the intended work to be completed for the University of Maine and subsequently, deliver accurate price totals year-over-

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year. In order to provide our best cost estimation(s), we would require the University of Maine to identify:

1. The total number of projected core facilities and their respective "size" (based on the below sizing guide) who be using iLab year-over-year
 - **Small** cores (<\$100,000 per year in recharge revenue)
 - **Regular** cores (\$100,000-\$550,000 per year in recharges)
 - **Large** cores (>\$550,000-\$1,000,000 per year in recharges)
 - **X-Large** cores (>\$1,000,000 per year in recharges)
2. The total number of core facilities interested in Interlock (Hardware or Software), their associated core facility "size", and the number of projected interlock boxes required per facility (dependent upon how the instrumentation are configured within the facilities/labs)

Q: Are you able to provide this information? If so, please provide.

ANSWER: For the first several years following implementation, UMaine is likely to be operating 3 regular cores and approximately 5 small cores. It's not possible to determine which facilities will require hardware or software interlocks or in what combination. This decision will be made as a CORE facility moves through the implementation phase.

8. After the question/inquiry submission period ends, are we permitted to verbally (via phone) communicate with the University of Maine (via Robin Cyr) or are all communications limited to email only?

ANSWER: Generally the communication occurs in writing via email.

9. As it pertains to Appendix J: Upon receiving and reviewing the RFP on May 4th, Appendix J was immediately provided to our Chief Technology Officer for review and completion. However, since we are in fact a SaaS based solution, we are required to complete the attached Educause-created Higher Education Cloud Vendor Assessment Tool. As the aforementioned assessment tool is comprised of ~200+ line items (each with a required question and submission due), our CTO may have questions tied specifically to the completion of the assessment outside of the defined Inquiries/Questions submittal deadline.

Q: If questions do arise after May 10th, are we permitted to relay these questions to the University of Maine (via Robin Cyr)?

ANSWER: Yes

10. Are you able to disclose (numerically) how many other vendors are actively bidding on this RFP? If so, please provide.

ANSWER: Unknown at this time

11. As of today, this RFP is primarily tied to the interests and future utilization by the University of Maine, however, there are 6 other universities composing the University of Maine System (UMS).

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Q1: Have these other 6 institutions been made aware of this RFP solicitation and expressed interest in a core facility management solution for their needs?

ANSWER: The lead campus is UMaine. Any determination of other campuses using this solution will be made at a later date.

Q2: If yes, while they'd be able to leverage a derived contract agreement from with the awarded party of this RFP, would each university be responsible for procuring the software at an individual level or would the purchase come from a more centralized body?

ANSWER: N/A

12. As it pertains to Appendix I, 1: We've completed the current VPAT at A level, but noted the AA level was selected for Question 1, B.

Q: Should our VPAT response be amended to be level AA as well or is A suitable for our RFP response?

ANSWER: The Accessibility evaluation is defined in Section 2.1.2 and the details regarding the requirements are in Appendix I.

13. The newest VPAT template includes Section 508 which is a standard maintained for federal agencies (this text is from <https://www.federalregister.gov/documents/2018/01/22/2018-00848/information-and-communication-technology-ict-standards-and-guidelines> "which revised and updated—in a single rulemaking—the standards for Section 508-covered ICT developed, procured, maintained, or used by Federal agencies (hereafter, "508 Standards")"

Q: We have not currently responded (nor did we intend to) to section 508 as we are not defined as a Federal agency. Does this present any issues for the University of Maine?

ANSWER: The Accessibility evaluation is defined in Section 2.1.2 and the details regarding the requirements are in Appendix I, Section 508 is required.