



Administered by University of Maine System  
Office of Strategic Procurement  
Request for Proposal (RFP)

Higher Education Event Management Solution  
RFP #2019-34

**Issued Date:** December 21, 2018

**Response Deadline Date/Time:** January 31, 2019, 5:00 p.m. EST

**Response Submission Information:**

Submitted electronically to [robin.cyr@maine.edu](mailto:robin.cyr@maine.edu)  
Email Subject Line – Event Management Solution  
RFP#2019-34

**Response Contact Information:**

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## 1.0 INTRODUCTION

### 1.1 Definitions, Background, Purpose and Specifications

#### 1.1.1 Definitions

The University of Maine System will hereinafter be referred to as the "University." Respondents to the document shall be referred to as "Respondent(s)" or "Respondent".

The Respondent to whom the Agreement is awarded shall be referred to as the "Contractor."

The University of Maine System and other components of the University shall be referred to as "Multi-Institution".

#### 1.1.2 Background

##### Overview

Established in 1968, the University of Maine System (UMS) unites seven distinctive public universities, comprising 10 campuses and numerous centers, in the common purposes of providing quality higher education while delivering on its traditional tripartite mission of teaching, research, and public service.

Maine's largest educational enterprise, the University extends its mission as a major resource for the state, linking economic growth, the education of its people, and the application of research and scholarship.

A comprehensive public institution of higher education, UMS serves nearly 40,000 students annually and is supported by the efforts of more than 2,000 full-time and part-time faculty, more than 3,000 regular full-time and part-time staff, and a complement of part-time temporary (adjunct) faculty.

Reaching more than 500,000 people annually through educational and cultural offerings, the University of Maine System also benefits from more than two-thirds of its alumni population residing within the state; more than 123,000 individuals.

The System consists of the following seven universities: University of Maine (UM); University of Maine at Machias (UMM); University of Maine at Augusta (UMA); University of Maine at Presque Isle (UMPI); University of Maine at Farmington (UMF); University of Southern Maine (USM); and, University of Maine at Fort Kent (UMFK).

*Operating within a shared services model, the offices of Information Technology, Strategic Procurement, Human Resources, Facilities, Risk and General Services, Finance and Budget, Shared Processing Center, General Counsel and Organizational Effectiveness partner to form the University Services organization.*

*Charged with delivering key administrative functions across the System, University Services is dedicated to leveraging its significant unit and collective resources to not only serve the immediate needs of its constituents, but deliver sustainable economies and efficiencies for the future benefit of the System as well.*

## **Campus thumbnails**

### **University of Maine at Augusta**

Founded in 1965, the University of Maine at Augusta transforms the lives of students of every age and background across the State of Maine and beyond through access to high-quality distance and on-site education, excellence in student support, civic engagement, and professional and liberal arts programs. Celebrating its 50<sup>th</sup> anniversary, UMA is the third largest public university in Maine. In addition to its main campus in the state's capital, UMA also serves students at its campus in Bangor (UMA Bangor) and through University College centers around the state. With its multiple locations and long-term expertise in online and distance learning, UMA is generally considered the university of choice for Mainers of all ages who want to attend college without uprooting their lives.

### **University of Maine at Farmington**

Established in 1864, the University of Maine at Farmington is a small, increasingly selective public liberal arts college, featuring programs in teacher education, the arts & sciences and professional studies, serving primarily full-time, traditional-age undergraduates in a residential setting. Farmington continues to be recognized for its academic quality, small classes, close-knit community and integrated curricular, co-curricular and extra-curricular offerings. With enrollment at around 1,800 full-time students, UMF is about the same size as many of New England's most selective private colleges and offers many of the same advantages, yet at a very attractive price.

### **University of Maine at Fort Kent**

Founded in 1878, the University of Maine at Fort Kent is a unique learning institution perfect for people seeking a rural scholastic atmosphere of modern academic standards combined with an eclectic mix of rugged outdoor vistas and access to cosmopolitan epicenters across two countries. The learning opportunities at UMFK have become a model of a "rural university" that other New England campuses attempt to emulate. Strong academic programs include associate and bachelor's degrees in such disciplines as nursing, business, education, forestry and cyber security among others. The student body at UMFK numbering 1,500, has a higher percentage of international students than any other university in New England, allowing immersion in a cultural opportunity that is unique in the world. Featuring seventy-seven full-time and adjunct faculty and eighty-one staff, UMFK enjoys national recognition for quality and value as well as championships in men's and women's soccer.

### **University of Maine at Machias**

The University of Maine at Machias, a member of the University of Maine System, sits on the Gulf of Maine, surrounded by rivers, forests, fishing villages, and blueberry barrens. This unspoiled portion of the Atlantic coast is known for its outdoor recreational opportunities and quality of life. As Maine's Coastal University, faculty and students approach the liberal arts with a focus on coastal, environmental and community issues. The academic experience emphasizes learning both in the classroom and in experiential settings. UMM's fifteen undergraduate degree programs serve approximately 800 students. The University's applied research and public services contribute to the improvement of the quality of life and economic development in Downeast Maine.

**University of Maine**

Established as a land grant college in 1865, the University of Maine is a public research university located in Orono and referred to as the flagship institution of the University of Maine System. UMaine, as it is often called, has an overall enrollment of over 11,000 students who pursue majors in ninety undergraduate disciplines, more than seventy masters' courses of study and thirty doctoral programs. Ranked 105<sup>th</sup> by the National Science Foundation among American research universities, UMaine's research faculty has an international reputation for excellence and the campus' Fogler Library is the largest in the state. Located on more than 600 acres only a few miles from Bangor, one of Maine's largest cities, the University of Maine is a major resource not only for education but economic and community development throughout the state as well.

**University of Maine at Presque Isle**

For more than a century, the University of Maine at Presque Isle has been helping students find their path to great professional careers providing its 1,100 traditional and non-traditional students from all areas of the state, country, and world with life-changing opportunities in a caring, small-university environment. UMPI combines liberal arts and selected professional programs and serves as a cultural and educational resource for the entire region. The campus sits on 150 acres surrounded by the rolling hills and potato fields of northern Maine and the University strives to be the region's premier learning institution while helping to stimulate cultural and economic development in Aroostook County and the State of Maine. The University serves as an educational and cultural center for the area and its facilities are utilized for lectures, programs, concerts, dance performances, exhibits, and plays that benefit the entire region.

**University of Southern Maine**

The University of Southern Maine, northern New England's outstanding public, regional, comprehensive university, is dedicated to providing its diverse student body of more than 9,000 students from forty states and thirty foreign countries with a high-quality, accessible, affordable education. Through its undergraduate, graduate, and professional programs, USM faculty members educate future leaders in the liberal arts and sciences, engineering and technology, health and social services, education, business, law, and public service. Located on three campuses in Gorham, Portland, and Lewiston-Auburn, USM is known as Maine's Metropolitan University and serves communities that are among the largest population centers in the state.

**1.1.3 Purpose**

The University of Maine (UMaine) is seeking a software solution to support all aspects of events management to be used by multiple units and facilities including Conferences and Institutes, Cooperative Extension, Hutchinson Center, Darling Marine Center, and Auxiliary Services. These units and facilities coordinate events for groups both internal and external to the University. The software solution should facilitate backend event management (housing, catering, room scheduling and work order generation) and offer a forward facing event calendar, online registration and PCI compliant web payments. It should also have a strong accounting and budgeting module as well as strong Customer Relationship Management (CRM) capability.

Respondents should review **1.1.4 Specifications / Scope of Work** of this document to see the full Scope of Services/Products required.

All campuses in the University of Maine System must be afforded the use of this solution, with all the same terms and conditions applicable to the various University locations.

This document provides instructions for submitting responses, the procedure and criteria by which the Respondent(s) will be selected, and the contractual terms which will govern the relationship between the University and the awarded Respondent(s).

#### 1.1.4 Specifications / Scope of Work

The specifications / scope of work for the Event Management Solution are as follows:

#	Category	Description	Importance	Bidder Response (enter one) Yes/Partial/No	If PARTIAL or NO please explain.
1	<b>Key Program Features</b>	Solution will provide a comprehensive event management including; billing, housing, dining, equipment registration and online payment for event.	Required		
2		Solution will provide or integrate with a real time, branded, web site and calendar for events and marketing of event capabilities.	Required		
3	<b>Event Scheduling</b>	Solution provides ability to restrict event scheduling and modifications to approved campus staff.	Required		
4		Solution provides graphic calendar used by campus staff to see space availability of <b>housing units</b> (bed decks).	Required		
5		Solution provides graphic calendar used by campus staff to see <b>venues on campus</b> .	Required		
6		Solution provides event organizer ability to request an event online, including components, such as, housing, food, venue equipment, etc	Preferred		
7		Solution provides ability to see venue images to support scheduling activities.	Preferred		
8	<b>Event Setup</b>	Solution provides ability for campus staff to generate a workorders for event catering, venue setup and equipment.	Required		
9		Solution provides API available for integration of work orders with other systems; higher education room scheduling solutions, Asset Works, catering system, etc.	Preferred		
10		Solution provides ability to see floor plans for event setup considerations.	Preferred		
11	<b>Event Registration</b>	Solution provides for event participants to complete event/workshop	Required		

		registrations and payment options online.			
12		Solution provides ability to offer promotion codes for use during the invoicing and payment processing.	Required		
13		Solution provides ability to communicate event details with organizer and participants; (printing or electronic).	Required		
14		Solution provides ability to up sell products (T-shirts, books, etc.) related to the event.	Nice to Have		
15		Solution provides ability to upload participant list in addition to allowing self registrations.	Preferred		
16	<b>Workflow Management</b>	Solution provides ability to document key requirements of moving the event forward (certificates of insurance, media releases, deposits, etc.)	Preferred		
17		Solution provides task management and checklist capabilities.	Preferred		
18	<b>Event &amp; Service Marketing</b>	Provide an integrated, real time, branded, web site for events and marketing of event capabilities.	Required		
19		Provides for creation/promotion of calendar items (events that do not require registration) alongside registration/payment events.	Preferred		
20		Allows for listing of recurring events (both free/walk-in events and those requiring registration)	Preferred		
21	<b>Post Event Activities</b>	Solution provides ability to track and issue certificates for workshop continuing education units	Preferred		
22		Provides ability to send follow-up emails to event participants.	Preferred		
23	<b>Internal User Interface</b>	Solution provides ability to integrate with University payment system, currently TouchNet	Required		
24		Solution provides ability for home page customization and branding.	Preferred		
25		Solution provides access by mobile devices for campus staff and customers.	Preferred		
26	<b>Customer Profile and Information Management</b>	Provide ability to store complete customer contact and demographic data, including multiple phone numbers, street addresses, email addresses, purchase history, etc.	Required		
27		Provide search capabilities via multiple criteria (e.g. last name, id numbers, event location, etc.) and ability to locate duplicate customer records, including deletion and or merging of duplicate records.	Required		
28		Provides ability to group/identify customers for recurring billing, such as membership tiers	Preferred		

29		Provide a contact comment field for logging comments/notes, conversations, time/date stamps, etc.	Preferred		
30		Provide ability to archive customer reports based on existing retention schedules.	Preferred		
31	<b>Integrated Data Warehouse / Analytics</b>	Solution provides ability to generate quote for customers and at event completion generate final invoice possibly split between more than one department.	Required		
32		Provide a standard suite of administrator and end-user dashboards and reports as part of the solution as well as the ability to personalize and customize reports.	Preferred		
32		Provide reports on customer profiles including purchase history, events attended, and demographic information.	Preferred		
33		Provide on demand sales activity reporting with configurable parameters (e.g. date, revenue, event, etc.).	Preferred		
34		Solution provides ability to store account codes which will be used for accounting with Peoplesoft.	Preferred		
35		Solution provides ability to generate contracts (“fill in the blanks” or letters we upload), track release and medical forms, certificate of insurance, etc.	Preferred		
36	<b>System Security / PCI Compliance</b>	Provide flexible payment processing options - i.e. Can the University collect all of the funds or can the system provider	Required		
37		Provide a solution that is compliant with Payment Card Industry (PCI) Data Security Standards.	Required		
38		Provide a PCI validated Point to Point Encryption (P2PE) solution	Required		
39		Provide systems mechanisms to detect and protect client/personal confidential information, commercial misuse, and hacking	Preferred		
40		Provide protections against anti-fraud, anti-thief, robot attacks and anti-malice	Preferred		
41		Include system security intrusion incident handling procedures, including methodology used to determine incident severity and timeline for escalation	Preferred		
42	<b>Forms &amp; Correspondence</b>	Solution provides ability to brand external communications and customer forms / information.	Preferred		
43	<b>Reporting</b>	Solution provides access to real-time data and offers custom report capabilities for common business support such as, financials (profit and loss, balance due, collection, year to date financial outlook, audit reports, revenue).	Required		



44		Solution provides ability to run usage reports by event location and category of client (non-profit, internal, external, etc.)	Preferred		
45		Solution provides space utilization reporting including accurate time and events scheduled.	Preferred		
46		Solution provides ability to report and filter by event categories and time frames.	Preferred		
47		Solution provides reports that can be exported into excel, csv, etc.	Preferred		
48	<b>Dedicated Vendor Campus Support /Service</b>	Provide a complete customer support structure – telephone number of support staff, web-based support, hours of operation, and process for prioritizing problems/issues. The University will require standard technical support Eastern Standard Time (EST), as well as emergency service 24/7, 365 days.	Required		
49		Appropriate notification by vendor to customer for all schedule maintenance.	Required		
50		Solution provides support through a website, accessible to users of assistive technology, with options for email, phone, and/or online chat contact.	Required		
51		Provide ongoing learning and training, including database and process manuals, interface guides and database schemas.	Preferred		
52		Provide an experienced account manager to manage the day to day partnership including relevant work experience with peer college institutions	Preferred		
53		Solution provides a robust online user community and social media forum or mailing list.	Preferred		
54	<b>Technology</b>	Solution provides fully hosted cloud solution.	Preferred		
55		Solution provides hosted (SaaS) service.	Preferred		
56		Solution has potential to provide ability to interface with Peoplesoft updated in real time via Application Program Interface (API) Web Services.	Required		
57		Solution provides technical support accessible via support tickets via web and telephone, during business hours.	Required		
58		Solution provides equal access to persons with disabilities as evidenced by compliance with the W3C's Web Content Accessibility Guidelines (WCAG) 2.0 Level AA and the Web Accessibility Initiative Accessible Rich Internet Applications Suite (WAI-ARIA) 1.1 for web content. Lacking such evidence, the contractor commits to providing evidence of compliance by	Required		

		qualified tester(s) within 6 months of the University's commitment to purchase the solution.			
59		Solution safeguards Compliant Data and Business Sensitive Information consistent with the University of Maine System's Information Security Policy and Standards. (infosecurity.maine.edu)  Compliant Data is defined as data that the University needs to protect in accordance with statute, contract, law or agreement. Examples include Family Educational Rights and Privacy Act (FERPA), Gramm-Leach-Bliley Act (GLBA), Maine Notice of Risk to Personal Data Act, and the Payment Card Industry Data Security Standards (PCI-DSS).	Required		
60		Solution provides ability to perform security audits and access control	Required		
61		Support of all major Web browsers for both PC/Windows and Apple/Mac platforms, such as Chrome, Firefox and Safari.	Required		
62		Solution provides capability to interface with WordPress Plugin to integrate with our current Content Management System, TouchNet and Peoplesoft.	Preferred		
63		Test environment to mirror production	Preferred		
64		Backup of data, archive of data to be kept for 7 years	Required		
65		Monitoring and alerting capability to support 99.9% uptime and two (2) hour recovery time	Preferred		
66		API available for integration with other systems; higher education room scheduling solutions, Asset Works, catering system, etc.	Preferred		
67	<b>Authentication integration</b>	Solution will provide compatibility with the University's Single Sign On (SSO) authentication protocol - Shibboleth.	Required		

## 1.2 General Information

### 1.2.1 Contract Administration and Conditions

1.2.1.1 The winning Respondent will be required to execute a contract in the form of a University of Maine System Contract for Services, which is attached to this response as **Appendix E**. Contract initial term and renewal periods are reflected in Section 2 of Appendix E, Contract for Services, and are subject to continued availability of funding and satisfactory performance.

The Agreement entered into by the parties shall consist of the University of Maine System Contract for Services (attached to this

document), the RFP, the selected Respondent's submission, including all appendices or attachments and clarifications, the specifications including all modifications thereof, and a Purchase Order or Letter of Agreement requiring signatures of the University and the Contractor, all of which shall be referred to collectively as the Agreement Documents.

In the event of a conflict of terms the following precedence will apply:

1. University of Maine System Contract for Services
2. Agreement Riders as required
3. Contract Amendments (as required)
4. The University's RFP
5. Respondent's Submission
6. Purchase Order or Letter of Agreement

1.2.1.2 Modification of Agreement terms and conditions is permitted except that the University, due to its public nature, will not :

- a. Provide any defense, hold harmless or indemnity;
- b. Waive any statutory or constitutional immunity;
- c. Apply the law of a state other than Maine;
- d. Procure types or amounts of insurance beyond those UMS already maintains or waive any rights of subrogation.
- e. Add any entity as an additional insured to UMS policies of insurance;
- f. Pay attorneys' fees, costs, expenses or liquidated damages;
- g. Promise confidentiality in a manner contrary to Maine's Freedom of Access Act;
- h. Permit an entity to change unilaterally any term or condition once the contract is signed;
- i. Accept any references to terms and conditions, privacy policies or any other websites, documents or conditions referenced outside of the contract; or
- j. Agree to automatic renewals for term(s) greater than month-to-month.

1.2.1.3 By submitting a response to a Request for Proposal, bid or other offer to do business with the University your entity understands and agrees that:

- a. The above Agreement provisions (**Section 1.2.1.2**) will not be modified and are thereby incorporated into any agreement entered into between University and your entity; that such terms and condition shall control in the event of any conflict with such agreement; and that your entity will not propose or demand any contrary terms;
- b. The above Agreement provisions (**Section 1.2.1.2**) will govern the interpretation of such agreement notwithstanding the expression of any other term and/or condition to the contrary;
- c. Your entity agrees that the resulting Agreement will be the entire agreement between the University (including University's employees and other End Users) and

Respondent and in the event that the Respondent requires terms of use agreements or other agreements, policies or understanding, whether on an order form, invoice, website, electronic, click-through, verbal or in writing, with University's employees or other End Users, such agreements shall be null, void and without effect, and the terms of the Agreement shall apply.

- d. Your entity will identify at the time of submission which, if any, portion or your submitted materials are entitled to "trade secret" exemption from disclosure under Maine's Freedom of Access Act; that failure to so identify will authorize UMS to conclude that no portions are so exempt; and that your entity will defend, indemnify and hold harmless UMS in any and all legal actions that seek to compel UMS to disclose under Maine's Freedom of Access Act some or all of your submitted materials and/or contract, if any, executed between UMS and your entity.

### 1.2.2 Communication with the University

It is the responsibility of the Respondent to inquire about any requirement of this document that is not understood. Responses to inquiries, if they change or clarify the document in a substantial manner, will be forwarded by addenda to all parties that have received a copy of the document. Addenda will also be posted on our web site, [www.maine.edu/strategic/upcoming\\_bids.php](http://www.maine.edu/strategic/upcoming_bids.php)

It is the responsibility of all Respondents to check the web site before submitting a response to ensure that they have all pertinent documents. The University will not be bound by oral responses to inquiries or written responses other than addenda.

Inquiries must be made using the **Response Contact Information** provided on the cover sheet of this document. Refer to table in **Section 1.3.1 Timeline of Key Events** for deadline requirements.

### 1.2.3 Confidentiality

The University must adhere to the provisions of the Maine Freedom of Access Act (FOAA), 1 MRSA §401 et seq. As a condition of submitting a response under this section, a respondent must accept that, to the extent required by the Maine FOAA, responses to this solicitation, and any ensuing contractual documents, are considered public records and therefore are subject to freedom of access requests.

The information contained in responses submitted for the University's consideration will be held in confidence until all evaluations are concluded and a Respondent selected (the successful Respondent). At that time the University will issue award notice letters to all participating Respondents and all Respondents' responses may be made available to participating Respondents upon request. Such request must be made by submitting a written request to the individual noted in the Response Contact Information shown on the cover sheet of this document, with a copy of the request provided to the other Respondents. Such requests are public records.

After the protest period has passed and the Agreement is fully executed, responses will be available for public inspection upon request.

Pricing and other information that is an integral part of the offer cannot be considered confidential after an award has been made. The University will honor requests for confidentiality for information that meets the definition of “trade secret” under Maine law. Clearly mark any portion of your submitted materials which are entitled to “trade secret” exemption from disclosure under Maine's Freedom of Access Act. Failure to so identify as trade secret will authorize the University to conclude that no portions are so exempt; and that your entity will defend, indemnify and hold harmless the University in any and all legal actions that seek to compel the University to disclose under Maine's Freedom of Access Act some or all of your submitted materials and/or contract, if any, executed between the University and your entity.

**1.2.4 Costs of Preparation**

Respondent assumes all costs of preparation of the response and any presentations necessary to the response process.

**1.2.5 Authorization**

Any Agreement for services that will, or may, result in the expenditure by the University of \$50,000 or more must be approved in writing by the Office of Strategic Procurement, Chief Procurement Officer and it is not approved, valid or effective until such written approval is granted.

**1.2.6 Multi-Institutional**

The University of Maine System, Office of Strategic Procurement reserves the right to authorize other University Institutions to use the Agreement(s) resulting from this document, if it is deemed to be beneficial for the University to do so.

**1.2.7 Pricing**

All prices provided shall remain firm for the entire term of the agreement.

**1.2.8 Cost Response Form Quantities**

The quantities shown on the cost response form are approximate only. The Contractor shall cover the actual needs of the University throughout the term of the Agreement regardless of whether they are more or less than the quantities shown.

**1.2.9 Employees**

The Contractor shall employ only competent and satisfactory personnel and shall provide a sufficient number of employees to perform the required services efficiently and in a manner satisfactory to the University. If the Agreement Administrator or designee, notifies the Contractor in writing that any person employed on this Agreement is incompetent, disorderly, or otherwise unsatisfactory, such person shall not again be employed in the execution of this Agreement without the prior written consent of the Agreement Administrator.

**1.2.10 Environment Compliance**

In the event that the resulting Agreement involves the generation, transportation, handling, disposal, and/or other operations or activities in relation to toxic, hazardous, radioactive, or otherwise dangerous gases, vapors, fumes, acids, alkali's, chemicals, wastes or contaminants and/or other substance, material or condition, the Contractor agrees to indemnify save harmless and defend the University from and against all liabilities, claims, damages, forfeitures, suits, and the costs and expenses incident thereto (including costs of defense, settlement and reasonable attorney's fees) which the University may hereafter incur as a result of death or bodily injuries or damage to any property, contamination of or adverse effects of the environment or any violation of state or federal regulations or laws (including without limitation the Resources Conservation and Recovery Act, the Hazardous Material Transportation Act or the Superfund Amendment and Reauthorization Act, as the same now exists or may hereafter be amended) or order based on or arising in whole or in part from the Contractor's performance under the Agreement, provided, however the Contractor shall not indemnify the University for any liabilities, claims, damages, (as set forth above) caused by or arising out of the sole negligence of the University, or arising out of any area of responsibility not attributable to Contractor.

## 1.3 General Submission Provisions

### 1.3.1 Timeline of Key Events

Reference Section	Event Name	Event Due Date
	Pre-Bid Conference Address initial QA from Respondents	January 7, 2019, 1:00 p.m. EST
Section 1.2.2	Deadline for Written Inquiries/Questions	January 16, 2019, 5:00 p.m. EST
Section 1.2.2	Response to Written Inquiries/Questions <b>(subject to change)</b>	January 23, 2019
Section 1.3.8	Deadline for Proposal Submission	January 31, 2019, 5:00 p.m. EST
Section 1.3.7	Estimated Respondent Presentation Date <b>(subject to change)</b>	February 20 & 21, 2019
Section 2.2	Award Announcement <b>(subject to change)</b>	March 8, 2019
	Estimated Agreement Start Date <b>(subject to change)</b>	March 18, 2019

### 1.3.2 Eligibility to Submit Responses

Public entities, private for-profit companies, and non-profit companies and institutions are invited to submit a response to this document.

### 1.3.3 Debarment

Respondents must complete and submit the “Debarment, Performance and Non-Collusion Certification Form provided in Appendix B. Failure to provide this certification may result in the disqualification of the Respondent’s proposal, at the University’s discretion.

Submission of a signed response in response to this solicitation is certification that your firm (or any subcontractor) is not currently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from participation in this transaction by any State or Federal department or agency. Submission is also agreement that the University will be notified of any change in this status.

### 1.3.4 Response Understanding

By submitting a response, the Respondent agrees and assures that the specifications are adequate, and the Respondent accepts the terms and conditions herein. Any exceptions should be noted in your response.

### 1.3.5 Response Validity

Unless specified otherwise, all responses shall be valid for ninety (90) days from the due date of the response.

### 1.3.6 Non-Response Submission

The University will not consider non-responsive submissions, i.e., those with material deficiencies, omissions, errors or inconsistencies or that otherwise do not follow instructions. The University in its sole discretion will determine what is Non-Responsive.

### 1.3.7 Respondents' Presentations

Presentations may be requested of two or more Respondents deemed by the University to be the best suited among those submitting responses on the basis of the selection criteria. After presentations have been conducted, the University may select the Respondent(s) which, in its opinion, has made the response that is the most responsive and most responsible and may award the Agreement to that/those Respondent(s).

### 1.3.8 Response Submission

A **SIGNED** virus-free electronic copy must be submitted as follows:

- The response must be received electronically to the E-Mail shown in the **Response Submission Information** section of the cover page of this document.
- Electronic submission must be received by the required **Response Deadline Date/Time** reflected on the cover page of this document.
- Response submissions that exceed 20 MB will be submitted with multiple emails modifying email subject line shown in the **Response Submission Information** section of the cover page of this document to include: Submission 1 of X ('X' representing the number of files being submitted).



## 2.0 EVALUATION AND AWARD PROCESS

### 2.1 Evaluation Criteria

#### 2.1.1 Scoring Weights

The score will be based on a 100 point scale and will measure the degree to which each response meets the following criteria:

Evaluation Appendices	Category	Points
Appendix C	Cost Evaluation	20
Appendix D	Contract for Services	10
Appendix E & F	Organization, Qualifications, Experience and References	10
Appendix G	General, Implementation, Training, Support and Reporting	20
Appendix H	Business Requirements Matrix & Presentation	25
Appendix K	Information Technology	15
Appendix I	Accessibility	Pass/Fail
Appendix J	Information Technology Security	Pass/Fail
<b>Total Points</b>		<b>100</b>

#### 2.1.2 Scoring Section Descriptions

##### 2.1.2.1 Cost Evaluation

The total cost proposed for conducting all the functions specified in this document will be assigned a score according to a mathematical formula. The lowest cost response will be awarded the total points. Responses with higher cost response values will be awarded proportionately fewer points calculated in comparison with the lowest cost response.

The scoring formula is:

(Lowest submitted cost response / cost of response being scored) x  
**Points** = pro-rated score

The University will NOT seek a best and final offer (BAFO) from any Respondent in this procurement process. All Respondents are expected to provide their best value pricing with the submission of their response. Respondents will NOT be given another opportunity to modify pricing once submitted.

##### 2.1.2.2 Contract for Services

The evaluation team will use a consensus approach to evaluate and assign evaluation based on pass/fail decision based on University risk assessment. The University reserves the right to reject any or all responses, in whole or in part, for any response receiving no points in this section in accordance with Section 2.2 Award.

Responses will be evaluated using the following guidelines:

- a. Full acceptance of the terms and conditions with the Respondents signature on the Agreement signature page, will receive the total points noted in Table 2.1.1.
- b. Revisions to the Agreement provisions specified in Section 1.2.1.2 will receive point reductions based on the University's risk assessment.
- c. Revisions to the Agreement provisions other than those specified in Section 1.2.1.2 will be evaluated at the University's discretion based on the University's risk assessment.

2.1.2.3 Organization, Qualifications, Experience and References

The evaluation team will use a consensus approach to evaluate and assign evaluation points. Reference checks will be performed on the top Respondent(s) only as determined by consensus scoring in the other categories.

2.1.2.4 Business Requirements Matrix & Presentation

The evaluation team will use a consensus approach to evaluate and assign evaluation points.

2.1.2.5 Implementation, Training, Support and Reporting

The evaluation team will use a consensus approach to evaluate and assign evaluation points.

2.1.2.6 Information Technology Security

The evaluation team will use a consensus approach to evaluate and assign evaluation based on pass/fail decision.

2.1.2.7 Accessibility

The evaluation team will use a consensus approach to evaluate and assign evaluation based on pass/fail decision.

2.1.2.8 Information Technology

The evaluation team will use a consensus approach to evaluate and assign evaluation points.

## 2.2 Award

While the University prefers a single solution that is scalable to meet the needs of both large and small institutions, it reserves the right to award Agreement(s) to one or multiple Respondents, which may include awards to Respondents for a geographical area, if such award is in the best interest of the University.

The University reserves the right to waive minor irregularities, which may include contacting the Respondent to resolve the irregularity. Scholarships, donations, or gifts to the University, will not be considered in the evaluation of responses. The University reserves the right to reject any or all responses, in whole or in part, and is not necessarily bound to accept the lowest cost response if that response is contrary to the best interests of the University. The University may cancel this request or reject any or all responses in whole or in part. Should the University determine in its sole discretion that only one Respondent

is fully qualified, or that one Respondent is clearly more qualified than any other under consideration, an Agreement may be awarded to that Respondent without further action.

### **2.3 Negotiations**

The University reserves the right to negotiate with the successful Respondent to finalize a contract. Such negotiations may not significantly vary the content, nature or requirements of the proposal or the University's Request for Proposals to an extent that may affect the price of goods or services requested. The University reserves the right to terminate contract negotiations with a selected respondent who submits a proposed contract significantly different from the response they submitted in response to the advertised RFP. In the event that an acceptable contract cannot be negotiated with the highest ranked Respondent, the University may withdraw its award and negotiate with the next-highest ranked Respondent, and so on, until an acceptable contract has been finalized. Alternatively, the University may cancel the RFP, at its sole discretion.

### **2.4 Award Protest**

Respondents may appeal the award decision by submitting a written protest to the University of Maine System's Chief Procurement Officer within five (5) business days of the date of the award notice, with a copy of the protest to the successful Respondent. The protest must contain a statement of the basis for the challenge. Further information regarding the appeal process can be found at

[http://staticweb.maine.edu/wp-content/uploads/2015/07/APL\\_VII-A\\_20150630-FINAL.pdf?565a1d](http://staticweb.maine.edu/wp-content/uploads/2015/07/APL_VII-A_20150630-FINAL.pdf?565a1d)

If this RFP results in the creation of a pre-qualified or pre-approved list of vendors, then the appeal procedures mentioned above are available upon the original determination of that vendor list, but not during subsequent competitive procedures involving only the pre-qualified or pre-approved list participants.

## 3.0 RESPONSE FORMAT REQUIREMENTS

### 3.1 General Format Instructions

#### 3.1.1 Electronic Submissions

Documents submitted as part of the electronic response are to be prepared on standard electronic formats of 8-1/2" x 11" and of PDF file type. Submissions requiring additional supporting information, such as, foldouts containing charts, spreadsheets, and oversize exhibits are permissible and must be submitted as Appendices, clearly numbered and referencing the Section in which they provide supporting information.

For clarity, the Respondent's name should appear on every document page, including Appendices. Each Appendix must reference the section or subsection number to which it corresponds.

#### 3.1.2 Respondents Responsibility

It is the responsibility of the Respondent to provide all information requested in the document package at the time of submission. Failure to provide information requested in this document may, at the discretion of the University's evaluation review team, result in a lower rating for the incomplete sections and may result in the response being disqualified for consideration. Include any forms provided in the application package or reproduce those forms as closely as possible. All information should be presented in the same order and format as described in this document.

#### 3.1.3 Brief Response

Respondents are asked to be brief and to respond to each question listed in the "Response to Questions" section of this document. Number each response in the response to correspond to the relevant question in this document.

#### 3.1.4 Additional Attachments Prohibited

The Respondent may not provide additional attachments beyond those specified in the document for the purpose of extending their response. Any material exceeding the response limit will not be considered in rating the response and will not be returned. Respondents shall not include brochures or other promotional material with their response. Additional materials will not be considered part of the response and will not be evaluated.

### 3.2 Response Format Instructions

This section contains instructions for Respondents to use in preparing their response. The Respondent's submission must follow the outline used below, including the numbering of section and sub-section headings. Failure to use the outline specified in this section or to respond to all questions and instructions throughout this document may result in the response being disqualified as non-responsive or receiving a reduced score.

The University and its evaluation team for this document have sole discretion to determine whether a variance from the document specifications should result in either disqualification or reduction in scoring of a response.

Re-phrasing of the content provided in this document will, at best, be considered minimally responsive. The University seeks detailed yet succinct responses that demonstrate the Respondent's experience and ability to perform the requirements specified throughout this document.

### **3.2.1 Section 1 - Response Cover Page**

- 3.2.1.1 Label this response - Section 1 – UMS Response Cover Page
- 3.2.1.2 Insert Appendix A – University of Maine System Response Cover Page
- 3.2.1.3 Insert Appendix B – Debarment, Performance and Non-Collusion Certification

### **3.2.2 Section 2 - Cost Response**

- 3.2.2.1 Label this response - Section 2 – Cost Evaluation
- 3.2.2.2 Insert Appendix C – Required Cost Evaluation Exhibits

### **3.2.3 Section 3 - Contract for Services**

- 3.2.3.1 Label this response - Section 3 – Contract for Services
- 3.2.3.2 Insert Appendix D – Contract for Services

### **3.2.4 Section 4 - Response to Questions**

- 3.2.4.1 Label this response - Section 4 – Response to Evaluation Questions & Related Information
- 3.2.4.2 Insert Appendix E – Organization Reference Form
- 3.2.4.3 Insert Appendix F – Evaluation Question(s) - Organization, Qualifications and Experience
- 3.2.4.4 Insert Appendix G – Evaluation Question(s) –Implementation, Training, Support and Reporting
- 3.2.4.5 Insert Appendix H – Business Requirements Matrix & Presentation
- 3.2.4.6 Insert Appendix I – Evaluation – Accessibility Requirements
  - Voluntary Product Accessibility Template (VPAT)
  - Detailed Description of Accessibility features.
- 3.2.4.7 Insert Appendix J – Evaluation Question(s) – Information Technology Security
- 3.2.4.8 Insert Appendix K – Evaluation Question(s) – Information Technology

## Appendix A – University of Maine System Response Cover Page

### RFP # 2019-34 Event Management Solution

Organization Name:	
Chief Executive – Name/Title:	
Telephone:	
Fax:	
Email:	
Headquarters Street Address:	
Headquarters City/State/Zip:	
Lead Point of Contact for Quote – Name/Title:	
Telephone:	
Fax:	
Email:	
Street Address:	
City/State/Zip:	

1. This pricing structure contained herein will remain firm for a period of 90 days from the date and time of the quote deadline date.
2. No personnel currently employed by the University or any other University agency participated, either directly or indirectly, in any activities relating to the preparation of the Respondent's response.
3. No attempt has been made or will be made by the Respondent to induce any other person or firm to submit or not to submit a response.
4. The undersigned is authorized to enter into contractual obligations on behalf of the above-named organization.
5. By submitting a response to a Request for Proposal, bid or other offer to do business with the University your entity understands and agrees that:
  - a. The Agreement provisions in **Section 1.2.1.2** of this document will not be modified and are thereby incorporated into any agreement entered into between University and your entity; that such terms and condition shall control in the event of any conflict with such agreement; and that your entity will not propose or demand any contrary terms;
  - b. The above Agreement provisions in **Section 1.2.1.2** of this document will govern the interpretation of such agreement notwithstanding the expression of any other term and/or condition to the contrary;
  - c. Your entity agrees that the resulting Agreement will be the entire agreement between the University (including University's employees and other End Users) and Respondent and in the event that the Respondent requires terms of use agreements or other agreements, policies or understanding, whether on an order form, invoice, website, electronic, click-through, verbal or in writing, with University's employees or other End Users, such agreements shall be null, void and without effect, and the terms of the Agreement shall apply.
  - d. Your entity will identify at the time of submission which, if any, portion or your submitted materials are entitled to "trade secret" exemption from disclosure under Maine's Freedom of Access Act; that failure to so identify will authorize UMS to conclude that no portions are so exempt; and that your entity will defend, indemnify and hold harmless UMS in any and all legal actions that seek to compel UMS to disclose under Maine's Freedom of Access Act some or all of your submitted materials and/or contract, if any, executed between UMS and your entity.

*To the best of my knowledge all information provided in the enclosed response, both programmatic and financial, is complete and accurate at the time of submission.*

Date: \_\_\_\_\_

\_\_\_\_\_  
Name and Title (Printed)

\_\_\_\_\_  
Authorized Signature

## Appendix B – Debarment, Performance and Non-Collusion Certification

**University of Maine System**  
**DEBARMENT, PERFORMANCE and NON-COLLUSION**  
**CERTIFICATION**  
RFP # 2019-34  
Event Management Solution

By signing this document, I certify to the best of my knowledge and belief that the aforementioned organization, its principals and any subcontractors named in this proposal:

- a. Are not presently debarred, suspended, proposed for debarment, and declared ineligible or voluntarily excluded from bidding or working on contracts issued by any governmental agency.
- b. Have not within three years of submitting the proposal for this contract been convicted of or had a civil judgment rendered against them for:
  - i. Fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a federal, state or local government transaction or contract.
  - ii. Violating Federal or State antitrust statutes or committing embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
  - iii. Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State or Local) with commission of any of the offenses enumerated in paragraph (b) of this certification; and
  - iv. Have not within a three (3) year period preceding this proposal had one or more federal, state or local government transactions terminated for cause or default.
- c. Have not entered into a prior understanding, agreement, or connection with any corporation, firm, or person submitting a response for the same materials, supplies, equipment, or services and this proposal is in all respects fair and without collusion or fraud. The above mentioned entities understand and agree that collusive bidding is a violation of state and federal law and can result in fines, prison sentences, and civil damage awards.

**Failure to provide this certification may result in the disqualification of the Respondent’s proposal, at the University’s discretion.**

Date: \_\_\_\_\_

\_\_\_\_\_  
Name and Title (Printed)

\_\_\_\_\_  
Authorized Signature



## Appendix C – Required Cost Evaluation Exhibits

University of Maine System  
COST EVALUATION

RFP # 2019-34  
Event Management Solution

### GENERAL INSTRUCTIONS:

1. The Respondent must submit a cost response that covers the entire period of the Agreement, including any optional renewal periods.
2. The cost response shall include the costs necessary for the Respondent to fully comply with the Agreement terms and conditions and requirements. **Note regarding total cost of ownership:** This “cost” will encompass the entire solution pricing along with all products and services offered as part of the solution.
3. Failure to provide the requested information and to follow the required cost response format provided in Appendix C may result in the exclusion of the Response from consideration, at the discretion of the University. You can add rows and columns required to insert additional information. If a particular cost table is not required as part of your response simply leave it blank.
4. No costs related to the preparation of the Response for this document or to the negotiation of the Agreement with the University may be included in the Response. Only costs to be incurred after the Agreement effective date that are specifically related to the implementation or operation of contracted services may be included.
5. Identify all costs by year, to be charged for performing the services necessary to accomplish the objectives of this document.
6. If there are additional options or services that are not included in the offering, they must be identified and itemized as “optional” and include a description of the product or service and the costs of the option. All items identified in the response (including third party items required) will be considered free add-ons to the proposed solution at the prices included in this response unless expressly stated otherwise.
7. Respondents are encouraged to provide additional price incentives for providing an enterprise solution, multi-year or award of multiple institutions.
8. Pricing will be guaranteed by the vendor for the term of the Agreement.
9. The University will NOT seek a best and final offer (BAFO) from any Respondent in this procurement process. All Respondents are expected to provide their best value pricing with the submission of their response. Respondents will NOT be given another opportunity to modify pricing once submitted.
10. An **MS Excel Version** must be included in your final submission for all of these tables. For a copy of the excel version, email the contact provided on the cover page of this document.

**INSTRUCTIONS FOR – Exhibit 1 (Table 1) - Licensing and Maintenance Agreement Pricing and/or Data Maintenance / Subscription Pricing**

The University needs to understand the associated lifecycle costs for your proposed system or service. For solution responses that leverage the University’s existing hardware and software investments, the Respondent must provide which licenses and maintenance agreements the University needs to maintain. For solution responses that do not leverage the University’s existing hardware and software investments, the Respondent must provide what additional equipment, licenses, and maintenance agreements we would need to purchase.

**IMPORTANT** - Respondents’ are required to provide separate costs for each institution.

**Respondent’s Organization Name** – Provide the Respondent’s Organization Name.

**University Name** – Institution name pertaining to the costs related to the solution.

**Item Description** - Provide a brief description of your product or service.

**Initial Cost “One Time” Training** – Provide any initial ‘one-time’ costs associated with the solution for training costs.

**Initial Cost “One Time” Implementation** – Provide any initial ‘one-time’ costs associated with the solution for implementation costs.

**Initial Cost “One Time” Other** - Provide any initial ‘one-time’ costs associated with the solution other than year 1 licensing and support, training and implementation costs.

**Cost (Year 1 – 5)** - All licensing and maintenance agreement pricing should include rates during the Agreement period, and anticipated future rates. Rates will be calculated based on Current Active User FTE provided.

**Optional Renewal (Year 6 – 7)** - All licensing and maintenance agreement pricing should include rates during the Agreement period, and anticipated future rates.

**Extended Cost** – Total of Initial Term Years 1 – 5

**Subtotal** – Subtotal of the Extended Cost figures.

**Less Discount** – Discount offered off the Subtotal figure.

**Total** – Subtotal less Discount.

**Exhibit 1 (Table 1)** – Respondents will use this attachment to record all costs associated with this section. For a copy of the excel version of Exhibit 1, email the contact provided on the cover page of this document.

Respondent's Name:		Licensing Maintenance Schedule										
#	Item Description	Initial Cost "One-Time" Training	Initial Cost "One-Time" Implementation	Initial Cost "One-Time" Other	Year 1 Cost	Year 2 Cost	Year 3 Cost	Year 4 Cost	Year 5 Cost	Year 6 (Optional Renewal)	Year 7 (Optional Renewal)	Extended Cost
1												
2												
3												
4												
	<b>Subtotal</b>											
	<b>Less Discount</b>											
	<b>Total</b>											
<p><b>Include additional explanation of costs and list assumptions that could influence the cost of licensing and maintenance pricing.</b></p> <p><b>List explanations and assumptions here:</b></p>												
	-											
	-											
	-											
	-											

**INSTRUCTIONS FOR - Exhibit 1 (Table 2) - Professional Services Rate Schedule**

If you charge by the hour for professional services, provide a rate schedule, or range of hourly rates we could expect. Specify whether or not those rates include travel.

**Respondent’s Organization Name** – Provide the Respondent’s Organization Name.

**Role/Position Title if Individual** - List role/position title of each role/position title from your organization that would be responsible for work on the project.

**Hourly Rate** - Is the hourly dollar amount that may be invoiced by role/position title.

**Exhibit 1 (Table 2)** – Respondents will use this attachment to record all costs associated with this section. For a copy of the excel version of Exhibit 1, email the contact provided on the cover page of this document.

<b>Respondent's Name:</b>		
<b>#</b>	<b>Role of Individual/Position Title</b>	<b>Hourly Rate</b>
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
	<b>Include additional explanation of costs and list assumptions that could influence the cost of change request pricing.</b>	
	<b>List explanations and assumptions here;</b>	
	-	
	-	

**INSTRUCTIONS FOR - Exhibit 1 (Table 3) - Pricing for Custom Features Deliverables**

Provide rate schedule for the high-level deliverables defined RFP Section 2.0 Scope of Work.

Costs for subcontractors are to be broken out separately.

**Respondent's Organization Name** – Provide the Respondent's Organization Name.

**University Name** – Institution name pertaining to the costs related to the solution.

**Deliverable Name** - Provide a brief name for the deliverable.

**Role/Position Title (Exhibit 1 Table 3)** - List each role/position title from your organization that would be responsible for contributing to completion of the deliverable. Bidder will replace verbiage 'Position Title 1', etc. with the appropriate actual role/position title in **Exhibit 1 (Table 2)**.

**Hours** – Note the total hours that will be required to provide the contribution necessary to complete the deliverable for each role/position title.

**Hourly Rate** - The hourly dollar amount that may be invoiced by role/position title.

**Cost Estimate** – Calculation of the (Hours x Hourly Rate = Cost Estimate)

**Sub-Total** – Provide a sub-total for each deliverable.

**Total** – Total cost for all deliverables to complete the work for the specified University campus. Your list of deliverables should trace back to the objectives and requirements listed in this document. Where a requirement is addressed by your product or service without customization, indicate that under the Explanation and reference the Licensing and Maintenance schedule above.

Total compensation for services rendered and deliverables shall include any hourly billing rate and all expected related expenses, both actual and administrative.

**Less Discount** – Discount offered off the Subtotal figure.

**Grand Total** – Subtotal less Discount.

**Exhibit 1 (Table 3)** – Respondents will use this attachment to record all costs associated with this section. For a copy of the excel version of Exhibit 1, email the contact provided on the cover page of this document.

Respondent's Name:					
#	Deliverable	Role/Position Title (Exhibit 1 Table 2)	Hours	Hourly Rate	Cost Estimate
<b>University Name:</b>					
1	Deliverable Name #1	Position Title 1			
2		Position Title 2			
3		Position Title 3			
4		Position Title 4			
5		Position Title 5			
6		Position Title 6			
7		Position Title 7			
8		Position Title 8			
9		Position Title 9			
10		Position Title 10			
<b>Sub-Total</b>					
1	Deliverable Name #2	Position Title 1			
2		Position Title 2			
3		Position Title 3			
4		Position Title 4			
5		Position Title 5			
6		Position Title 6			
7		Position Title 7			
8		Position Title 8			
9		Position Title 9			
10		Position Title 10			
<b>Sub-Total</b>					
<b>Total</b>					
<b>Less Discount</b>					
<b>Grand Total</b>					
<b>Include additional explanation of costs and list assumptions that could influence the pricing for custom features.</b>					
List explanations and assumptions here:					
-					
-					

**INSTRUCTIONS FOR - Exhibit 1 (Table 4) - Growth and Enhancement Pricing**

Growth and Enhancements are products or services not included in the baseline pricing that we may want to purchase at a later date to add functionality to the event management solution. These may vary by Respondent response. There is no penalty for not completing this section.

**IMPORTANT** - Respondents' are required to provide separate costs for each institution.

**Respondent's Organization Name** – Provide the Respondent's Organization Name.

**Item Description** - Provide a brief description of your product or service.

**Initial Cost "One Time" Training** – Provide any initial 'one-time' costs associated with the solution for training costs.

**Initial Cost "One Time" Implementation** – Provide any initial 'one-time' costs associated with the solution for implementation costs.

**Initial Cost "One Time" Other** - Provide any initial 'one-time' costs associated with the solution other than year 1 licensing and support, training and implementation costs.

**Cost (Year 1 – 5)** - All licensing and maintenance agreement pricing should include rates during the Agreement period, and anticipated future rates. Rates will be calculated based on Current Active User FTE provided.

**Optional Renewal (Year 6 – 7)** - All licensing and maintenance agreement pricing should include rates during the Agreement period, and anticipated future rates.

**Extended Cost** – Total of Initial Term Years 1 – 5

**Subtotal** – Subtotal of the cost figures for each year.

**Less Discount** – Discount offered off the Subtotal figure.

**Total** – Subtotal less Discount.

**Exhibit 1 (Table 4)** – Respondents will use this attachment to record all costs associated with this section. For a copy of the excel version of Exhibit 1, email the contact provided on the cover page of this document.

Respondent's Name:		Licensing Maintenance Schedule										
Item Description #	Initial Cost "One-Time" Training	Initial Cost "One-Time" Implementation	Initial Cost "One-Time" Other	Year 1 Cost	Year 2 Cost	Year 3 Cost	Year 4 Cost	Year 5 Cost	Year 6 (Optional Renewal)	Year 7 (Optional Renewal)	Extended Cost	
<b>Solution Pricing for Individual Module</b>												
1												
2												
3												
4												
	<b>Subtotal</b>											
	<b>Less Discount</b>											
	<b>Total</b>											
Include additional explanation of costs and list assumptions that could influence the cost of licensing and maintenance pricing.												
List explanations and assumptions here:												
-												



## Appendix D – Contract for Services

### UNIVERSITY OF MAINE SYSTEM CONTRACT FOR SERVICES MASTER AGREEMENT

This Contract for Services Master Agreement (“Agreement” or “Master Agreement”) entered into this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_, by and between the **University of Maine System**, hereinafter referred to as the “**University**”, and \_\_\_\_\_, hereinafter referred to as “**Contractor**”.

**WITNESSETH**, that for and in consideration of the payments and agreements hereinafter mentioned, to be made and performed by the University, the Contractor hereby agrees with the University to provide the products and services described in this agreement, and the following Riders, hereby incorporated into this Agreement and made part of it by reference:

**Rider A** - Specifications of Work to be Performed

**Rider A-1** – Pricing

**Rider B** – Insurance Requirements

**Rider C** – University of Maine System Standards for Safeguarding Information

**Rider D** – Services Engagement Form

**Rider E** – Implementation Plan and Timeline

**Rider F** – Contractor’s Service Level Agreement to Support the University

**Contract Amendments** as required

**Request for Proposal #2019-34** Issue Date December 21, 2018 Titled Higher Education Event Management Solution

**Contractor’s Bid in Response to Request for Proposal #2019-34** Proposal Submission Date January 31, 2019 Titled Higher Education Event Management Solution

**WHEREAS**, the University desires to enter into a contract for professional services, and the Contractor represents itself as competent and qualified to accomplish the specific requirements of this Contract to the satisfaction of the University;

**NOW THEREFORE**, in consideration of the mutual promises contained herein, the parties hereby agree as follows:

This Agreement, along with any documents identified, which are incorporated by reference, constitutes the entire Agreement between the parties, and there are no other or further written or oral understandings or agreements with respect thereto.

1. **Specifications of Work:** The Contractor agrees to perform the Specifications of Work as described in **Rider A**, hereby incorporated by reference.

**Rider A** provides a suite of services offered by the Contractor to the University. As required by the University institutions, the parties will develop jointly specific Services Engagement documents. The required format of this document is detailed in **Rider D**. The document will be governed by all the terms

in this agreement; except that the engagement administrator for purposes of managing the service deliverables may be different than this Agreement Administrator and the term may be different than the term of the agreement but may not extend beyond this Agreement termination date. The Services Engagement document will be fully executed by the parties. Institutions may execute more than one agreement for services to support their needs over the term of this Agreement

2. **Term:** This Contract shall commence on **November 5, 2018** and shall terminate on **November 4, 2023**, unless terminated earlier as provided in this Contract with option for two (2) one (1) or one (1) two (2) year renewals upon the parties' mutual agreement.

3. **Payment:**

- A. Payment shall be made upon submittal of an electronic invoice to the University by the Contractor on a net 30 basis unless discount terms are offered. In the event there is a discrepancy with the invoice, payment terms shall be effective starting on the date the discrepancy is resolved, for only that portion of the invoice that is disputed. Invoices must include a purchase order number.

- B. **"Additional Services"** The University will have the option to purchase additional services under this Agreement.

As required by the University institutions, the parties will develop jointly specific Services Engagement documents. The required format of this document is detailed in **Rider D**.

4. **Termination:** The **Agreement or a Services Engagement (Rider D)** may be terminated by the University in whole, or in part, whenever for any reason the University shall determine that such termination is in the best interest of the University. Any such termination shall be effected by delivery to the Contractor of a Notice of Termination specifying the extent to which performance of the Agreement is terminated and the date on which such termination becomes effective. The University shall pay all allowable costs incurred up to the effective date of termination. However, the Contractor shall not be reimbursed for any costs incurred after the effective date of termination.
5. **Obligations Upon Termination:** Any materials produced in performance of this agreement are the property of the University and shall be turned over to the University upon request. The University shall pay the Contractor for all services performed to the effective date of termination subject to offset of sums owed by the Contractor to the University.
6. **Non-Appropriation:** Notwithstanding any other provision of this Agreement, if the University is not appropriated sufficient funds to pay for the work to be performed under this Agreement or if funds are de-appropriated, then the University is not obligated to make payment under this Agreement.
7. **Conflict of Interest:** No officer or employee of the University shall participate in any decision relating to this contract which affects his or her personal interest in any entity in which he or she directly or indirectly has interest. No employee of the University shall have any interest, direct or indirect, in this contract or proceeds thereof.
8. **Modification:** This Contract may be modified or amended only in a writing signed by both parties.
9. **Assignment:** This Contract, or any part thereof, may not be assigned, transferred or subcontracted by the Contractor without the prior written consent of the University.
10. **Applicable Law:** This Contract shall be governed and interpreted according to the laws of the State of Maine.

11. **Administration:** \_\_\_\_\_ shall be the University's authorized representative in all matters pertaining to the administration of the terms and conditions of this Contract.
12. **Non-Discrimination:** In the execution of the contract, the Contractor shall not discriminate on the basis of race, color, religion, sex, sexual orientation, transgender status or gender expression, national origin or citizenship status, age, disability, genetic information, or veteran status and shall provide reasonable accommodations to qualified individuals with disabilities upon request. The university encourages the employment of qualified individuals with disabilities.
13. **Indemnification:** The Contractor shall comply with all applicable federal, state and local laws, rules, regulations, ordinances and orders relating to the services provided under this Contract. Contractor shall indemnify, defend and hold the University, its Trustees, officers, employees, and agents, harmless from and against any and all loss, liability, claims, damages, actions, lawsuits, judgments and costs, including reasonable attorney's fees, that the University may become liable to pay or defend arising from or attributable to any acts or omissions of the Contractor, its agents, employees or subcontractors, in performing its obligations under this Contract, including, without limitation, for violation of proprietary rights, copyrights, or rights of privacy, arising out of a publication, translation, reproduction, delivery, performance, use or disposition of any data furnished under the Contract or based on any libelous or other unlawful matter contained in such data.
14. **Contract Validity:** In the event one or more clauses of this Contract are declared invalid, void, unenforceable or illegal, that shall not affect the validity of the remaining portions of this Contract.
15. **Independent Contractor:** Contractor is an independent contractor of the University, not a partner, agent or joint venture of the University and neither Party shall hold itself out contrary to these terms by advertising or otherwise, nor shall either party be bound by any representation, act or omission whatsoever of the other. For U.S. entities, Contractor, its employees and subcontractors if any, is/are independent contractors for whom no Federal or State Income Tax will be deducted by the University, and for whom no retirement benefits, social security benefits, group health or life insurance, vacation and sick leave, Worker's Compensation and similar benefits available to University's employees will accrue. The parties further understand that annual information returns as required by the Internal Revenue Code and Maine Income Tax Law will be filed by the University with copies sent to Contractor. Contractor will be responsible for compliance with all applicable laws, rules and regulations involving but not limited to, employment, labor, Workers Compensation, hours of work, working conditions, payment of wages, and payment of taxes, such as unemployment, social security and other payroll taxes, including other applicable contributions from such persons when required by law.
16. **Intellectual Property:** Any information and/or materials, finished or unfinished, produced in performance of this Contract, and all of the rights pertaining thereto, are the property of the University and shall be turned over to the University upon request.
17. **Entire Contract:** This Contract sets forth the entire agreement between the parties on the subject matter hereof and replaces and supersedes all prior agreements on the subject, whether oral or written, express or implied. This Contract is the entire agreement between the University (including University's employees and other End Users) and Contractor. In the event that Contractor enters into terms of use agreements or other agreements, policies or understandings, whether on Contractor's purchase order, website, electronic, click-through, verbal or in writing, with University's employees or other End Users, such agreements shall be null, void and without effect, and the terms of this Contract shall apply. University will not be bound to any other terms and conditions set forth in any documents, agreements or policies posted on Contractor's website unless such terms and conditions are set forth in this Contract. Contractor may not unilaterally change any term or condition of this Contract.
18. **Licensing:** Contractor shall secure in its name and at its expense all federal, state, and local licenses and permits required for operation under this Contract. Contractor shall provide proof of such licensure or permit to the University prior to commencing work under this Contract.

19. **Record Keeping, Audit and Inspection of Records:** The Contractor shall maintain books, records and other compilations of data pertaining to the requirements of the Contract to the extent and in such detail as shall properly substantiate claims for payment under the Contract. All such records shall be kept for a period of seven years or for such longer period as specified herein. All retention periods start on the first day after the final payment of the Contract. If any litigation, claim, negotiation, audit or other action involving the records is commenced prior to the expiration of the applicable retention period, all records shall be retained until completion of the action and resolution of all issues resulting therefrom, or until the end of the applicable retention period, whichever is later. The University, the grantor agency (if any), or any of their authorized representatives shall have the right at reasonable times and upon reasonable notice, to examine and copy the books, records and other compilations of data of the Contractor pertaining to this Contract. Such access shall include on-site audits.
20. **Publicity, Publication, Reproduction and use of Contract's Products or Materials:** Unless otherwise provided by law or the University, title and possession of all data, reports, programs, software, equipment, furnishings and any other documentation or product paid for with University funds shall vest with the University. The Contractor shall at all times obtain the prior written approval of the University before it, any of its officers, agents, employees or subcontractors, either during or after termination of the Contract, makes any statement bearing on the work performed or data collected under this Contract to the press or issues any material for publication through any medium of communication. If the Contractor or any of its subcontractors publishes a work dealing with any aspect of performance under the Contract, or of the results and accomplishments attained in such performance, the University shall have a royalty free, non-exclusive and irrevocable license to reproduce, publish or otherwise use and to authorize others to use the publication.
21. **Confidentiality:** The contractor shall comply with all laws and regulations relating to confidentiality and privacy including but not limited to any rules or regulations of the University.
22. **Force Majeure:** Neither party shall be liable to the other or be deemed to be in breach of this Contract for any failure or delay in rendering performance arising out of causes beyond its reasonable control and without its fault or negligence. Such causes may include, but are not limited to, acts of God or of a public enemy, fires, flood, epidemics, strikes, embargoes or unusually severe weather. Dates or time of performance shall be extended to the extent of delays excused by this section provided that the party whose performance is affected notifies the other promptly of the existence and nature of such delay.
23. **Notices:** Unless otherwise specified in an attachment hereto, any notice hereunder shall be in writing and addressed to the persons and addresses below.

**To the University:**

University of Maine System  
Robinson Hall  
46 University Drive  
Augusta, ME 04330

Attn: **Contract Administration**

**To Contractor:**

**<<BID INSTRUCTIONS – Bidder to supply information noted below for submission with their proposal. >>**

**Company Name:**

**Contact Name:**

**Address:**

Phone Number:

Fax Number:

24. **Invoices:** Unless otherwise specified in an attachment hereto, invoices and questions regarding invoices will be directed to:

University of Maine System  
Accounts Payable  
PO Box 533  
Bangor, ME 04402

Phone: [207-581-2692](tel:207-581-2692)  
Fax: [207-581-2698](tel:207-581-2698)  
Email: [UMAP@maine.edu](mailto:UMAP@maine.edu)

25. **Order of Precedence:** In the event of any conflict among the documents in this agreement, the following order of precedence shall apply:

- A. **Terms and conditions of this Agreement**
- B. **Rider A** - Specifications of Work to be Performed
- C. **Rider A-1** – Pricing
- D. **Rider B** – Insurance Requirements
- E. **Rider C** – University of Maine System Standards for Safeguarding Information
- F. **Rider D** – Services Engagement Form
- G. **Rider E** – Implementation Plan and Timeline
- H. **Rider F** – Contractor’s Service Level Agreement to Support the University
- I. **Contract Amendments** as required
- J. **Request for Proposal #2019-34** Issue Date December 21, 2018 Titled Higher Education Event Management Solution
- K. **Contractor’s Bid in Response to Request for Proposal #2019-34** Proposal Submission Date January 31, 2019 Titled Higher Education Event Management Solution

26. **Multi-Institution Capabilities** University will have the option to include products and services under this Agreement to additional University institutions, this includes any additional University institutions formed during the term of this agreement, all facilities utilized by an institution including those managed and/or owned by a third party, and additional entities, such as, the University College a division of University of Maine at Augusta.

**The Community College System and Maine Maritime Academy**, both public higher education institutions in the state, shall be permitted to piggyback off of the University’s contract if they should so desire. The Contractor agrees to further provide the products and services, with all the same terms and conditions applicable, to these additional entities.

27. **Smoking Policy**

The University must comply with the "Workplace Smoking Act of 1985" and M.R.S.A. title 22, § 1541 et seq "Smoking Prohibited in Public Places." In addition, University Institutions may have specific Smoking Prohibitions. The Respondent shall be responsible for the implementation and enforcements of these restrictions.

**Signatures**

FOR THE UNIVERSITY OF MAINE SYSTEM:

FOR THE CONTRACTOR:

BY: \_\_\_\_\_

LEGAL NAME: \_\_\_\_\_

(signature)

BY: \_\_\_\_\_

(signature)

Name: \_\_\_\_\_

Name: \_\_\_\_\_

(print or type)

(print or type)

Title: \_\_\_\_\_

Title: \_\_\_\_\_

Address: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Telephone: \_\_\_\_\_

\_\_\_\_\_

Fax: \_\_\_\_\_

Telephone: \_\_\_\_\_

Date: \_\_\_\_\_

Fax: \_\_\_\_\_

Date: \_\_\_\_\_

Tax ID #: \_\_\_\_\_

**Per University policy, “Any contract or agreement for services that will, or may, result in the expenditure by the University of \$50,000 or more must be approved in writing by the Chief Procurement Officer, or designee, and if it is not approved, valid or effective until such written approval is granted.”**

**Chief Financial Officer approval is required of any University of Maine System agreement of \$50,000 or more, and it is not approved, valid or effective until such written approval is granted.**

**Chief Business Officer approval is required of any campus specific agreement of \$50,000 or more, and it is not approved, valid or effective until such written approval is granted.**

BY: \_\_\_\_\_

BY: \_\_\_\_\_

Title: \_\_\_\_\_

Title: \_\_\_\_\_

Chief Procurement Officer or designee

Chief Financial/Business Officer or designee

Date: \_\_\_\_\_

Date: \_\_\_\_\_

## RIDER A SPECIFICATIONS OF WORK TO BE PERFORMED

The Contractor agrees to the **Specifications of Work to be Performed** as follows:

### INTENT AND PURPOSE

The University of Maine (UMaine) sought a software solution to support all aspects of events management to be used by multiple units and facilities including Conferences and Institutes, Cooperative Extension, Hutchinson Center, Darling Marine Center, and Auxiliary Services. These units and facilities coordinate events for groups both internal and external to the University. The software solution should facilitate backend event management (housing, catering, room scheduling and work order generation) and offer a forward facing event calendar, online registration and PCI compliant web payments. It should also have a strong accounting and budgeting module as well as strong Customer Relationship Management (CRM) capability.

### PRODUCT SCOPE OF WORK:

The specifications / scope of work for the Event Management Solution are as follows:

#	Category	Description	Importance	Bidder Response (enter one) Yes/Partial/No	If PARTIAL or NO please explain.
1	<b>Key Program Features</b>	Solution will provide a comprehensive event management including; billing, housing, dining, equipment registration and online payment for event.	Required		
2		Solution will provide or integrate with a real time, branded, web site and calendar for events and marketing of event capabilities.	Required		
3	<b>Event Scheduling</b>	Solution provides ability to restrict event scheduling and modifications to approved campus staff.	Required		
4		Solution provides graphic calendar used by campus staff to see space availability of <b>housing units</b> (bed decks).	Required		
5		Solution provides graphic calendar used by campus staff to see <b>venues on campus</b> .	Required		
6		Solution provides event organizer ability to request an event online, including components, such as, housing, food, venue equipment, etc	Preferred		
7		Solution provides ability to see venue images to support scheduling activities.	Preferred		
8	<b>Event Setup</b>	Solution provides ability for campus staff to generate a workorders for event catering, venue setup and equipment.	Required		

9		Solution provides API available for integration of work orders with other systems; higher education room scheduling solutions, Asset Works, catering system, etc.	Preferred		
10		Solution provides ability to see floor plans for event setup considerations.	Preferred		
11	<b>Event Registration</b>	Solution provides for event participants to complete event/workshop registrations and payment options online.	Required		
12		Solution provides ability to offer promotion codes for use during the invoicing and payment processing.	Required		
13		Solution provides ability to communicate event details with organizer and participants; (printing or electronic).	Required		
14		Solution provides ability to up sell products (T-shirts, books, etc.) related to the event.	Nice to Have		
15		Solution provides ability to upload participant list in addition to allowing self registrations.	Preferred		
16	<b>Workflow Management</b>	Solution provides ability to document key requirements of moving the event forward (certificates of insurance, media releases, deposits, etc.)	Preferred		
17		Solution provides task management and checklist capabilities.	Preferred		
18	<b>Event &amp; Service Marketing</b>	Provide an integrated, real time, branded, web site for events and marketing of event capabilities.	Required		
19		Provides for creation/promotion of calendar items (events that do not require registration) alongside registration/payment events.	Preferred		
20		Allows for listing of recurring events (both free/walk-in events and those requiring registration)	Preferred		
21	<b>Post Event Activities</b>	Solution provides ability to track and issue certificates for workshop continuing education units	Preferred		
22		Provides ability to send follow-up emails to event participants.	Preferred		
23	<b>Internal User Interface</b>	Solution provides ability to integrate with University payment system, currently TouchNet	Required		
24		Solution provides ability for home page customization and branding.	Preferred		
25		Solution provides access by mobile devices for campus staff and customers.	Preferred		
26	<b>Customer Profile and Information Management</b>	Provide ability to store complete customer contact and demographic data, including multiple phone numbers, street addresses, email addresses, purchase history, etc.	Required		



27		Provide search capabilities via multiple criteria (e.g. last name, id numbers, event location, etc.) and ability to locate duplicate customer records, including deletion and or merging of duplicate records.	Required		
28		Provides ability to group/identify customers for recurring billing, such as membership tiers	Preferred		
29		Provide a contact comment field for logging comments/notes, conversations, time/date stamps, etc.	Preferred		
30		Provide ability to archive customer reports based on existing retention schedules.	Preferred		
31	<b>Integrated Data Warehouse / Analytics</b>	Solution provides ability to generate quote for customers and at event completion generate final invoice possibly split between more than one department.	Required		
32		Provide a standard suite of administrator and end-user dashboards and reports as part of the solution as well as the ability to personalize and customize reports.	Preferred		
32		Provide reports on customer profiles including purchase history, events attended, and demographic information.	Preferred		
33		Provide on demand sales activity reporting with configurable parameters (e.g. date, revenue, event, etc.).	Preferred		
34		Solution provides ability to store account codes which will be used for accounting with Peoplesoft.	Preferred		
35		Solution provides ability to generate contracts (“fill in the blanks” or letters we upload), track release and medical forms, certificate of insurance, etc.	Preferred		
36	<b>System Security / PCI Compliance</b>	Provide flexible payment processing options - i.e. Can the University collect all of the funds or can the system provider	Required		
37		Provide a solution that is compliant with Payment Card Industry (PCI) Data Security Standards.	Required		
38		Provide a PCI validated Point to Point Encryption (P2PE) solution	Required		
39		Provide systems mechanisms to detect and protect client/personal confidential information, commercial misuse, and hacking	Preferred		
40		Provide protections against anti-fraud, anti-thief, robot attacks and anti-malice	Preferred		
41		Include system security intrusion incident handling procedures, including methodology used to determine incident severity and timeline for escalation	Preferred		

42	<b>Forms &amp; Correspondence</b>	Solution provides ability to brand external communications and customer forms / information.	Preferred		
43	<b>Reporting</b>	Solution provides access to real-time data and offers custom report capabilities for common business support such as, financials (profit and loss, balance due, collection, year to date financial outlook, audit reports, revenue).	Required		
44		Solution provides ability to run usage reports by event location and category of client (non-profit, internal, external, etc.)	Preferred		
45		Solution provides space utilization reporting including accurate time and events scheduled.	Preferred		
46		Solution provides ability to report and filter by event categories and time frames.	Preferred		
47		Solution provides reports that can be exported into excel, csv, etc.	Preferred		
48	<b>Dedicated Vendor Campus Support /Service</b>	Provide a complete customer support structure – telephone number of support staff, web-based support, hours of operation, and process for prioritizing problems/issues. The University will require standard technical support Eastern Standard Time (EST), as well as emergency service 24/7, 365 days.	Required		
49		Appropriate notification by vendor to customer for all schedule maintenance.	Required		
50		Solution provides support through a website, accessible to users of assistive technology, with options for email, phone, and/or online chat contact.	Required		
51		Provide ongoing learning and training, including database and process manuals, interface guides and database schemas.	Preferred		
52		Provide an experienced account manager to manage the day to day partnership including relevant work experience with peer college institutions	Preferred		
53		Solution provides a robust online user community and social media forum or mailing list.	Preferred		
54	<b>Technology</b>	Solution provides fully hosted cloud solution.	Preferred		
55		Solution provides hosted (SaaS) service.	Preferred		
56		Solution has potential to provide ability to interface with Peoplesoft updated in real time via Application Program Interface (API) Web Services.	Required		
57		Solution provides technical support accessible via support tickets via web and telephone, during business hours.	Required		

58		Solution provides equal access to persons with disabilities as evidenced by compliance with the W3C's Web Content Accessibility Guidelines (WCAG) 2.0 Level AA and the Web Accessibility Initiative Accessible Rich Internet Applications Suite (WAI-ARIA) 1.1 for web content. Lacking such evidence, the contractor commits to providing evidence of compliance by qualified tester(s) within 6 months of the University's commitment to purchase the solution.	Required		
59		Solution safeguards Compliant Data and Business Sensitive Information consistent with the University of Maine System's Information Security Policy and Standards. (infosecurity.maine.edu)  Compliant Data is defined as data that the University needs to protect in accordance with statute, contract, law or agreement. Examples include Family Educational Rights and Privacy Act (FERPA), Gramm-Leach-Bliley Act (GLBA), Maine Notice of Risk to Personal Data Act, and the Payment Card Industry Data Security Standards (PCI-DSS).	Required		
60		Solution provides ability to perform security audits and access control	Required		
61		Support of all major Web browsers for both PC/Windows and Apple/Mac platforms, such as Chrome, Firefox and Safari.	Required		
62		Solution provides capability to interface with WordPress Plugin to integrate with our current Content Management System, TouchNet and Peoplesoft.	Preferred		
63		Test environment to mirror production	Preferred		
64		Backup of data, archive of data to be kept for 7 years	Required		
65		Monitoring and alerting capability to support 99.9% uptime and two (2) hour recovery time	Preferred		
66		API available for integration with other systems; higher education room scheduling solutions, Asset Works, catering system, etc.	Preferred		
67	<b>Authentication integration</b>	Solution will provide compatibility with the University's Single Sign On (SSO) authentication protocol - Shibboleth.	Required		

**Additional Scope:** The Contractor shall permit product and services not covered herein to be added by mutual agreement, without voiding the provisions of the existing contract. The Contractor, for additional consideration, shall furnish additional such products and services to the University.

**PRICING:** Refer to RIDER A-1. Pricing will be valid for the term of the Agreement.

**PERFORMANCE TERMS AND CONDITIONS**

1. **Employees:** The Contractor shall employ only competent and satisfactory personnel and shall provide a sufficient number of employees to perform the required services efficiently and in a manner satisfactory to the University. If the University Contract Administrator notifies the Contractor in writing that any person employed on this Contract is incompetent, disorderly, or otherwise unsatisfactory, such person shall not again be utilized in the execution of this Contract without the prior written consent of the Contract Administrator.
2. **Business and Performance Reviews:** Recognizing that successful performance of this contract is dependent on favorable response, the Contractor shall meet at least quarterly with the Contract Administrator or designee for a business and performance review to evaluate operations and make necessary adjustments. These meetings will normally be conducted electronically but shall be face-to-face on demand. As part of these reviews, the University reserves the right to review equipment specifications quarterly and update equipment specifications accordingly. Contractor shall provide a single point of contact (i.e., relationship manager) and shall notify University in writing and in advance whenever there is a change to that single point of contact.
3. **Campus Visits:** The Contractor agrees to maintain good relations with the University. The Contractor shall make campus visits “as needed” on three days’ notice. The Contractor will coordinate campus visits with the University Services Information and Technology Department to ensure proper communication and sharing of information related to customer projects.
4. **Toll-Free Access:** The Contractor shall provide to the University, toll-free telephone access to technical support. The University prefers a unique toll-free telephone number just for the University. The Contractor shall provide an escalated support feature to ensure that unresolved support issues can be elevated to upper level management.
5. **Accessibility:** If the solution, services or deliverables include any Information or Communication Technology (ICT) containing a human-interface, such as an end-user software component, web pages or site, video or audio playback, file upload system, mobile device components, control panel, reports, documents, keypad, etc., the Contractor hereby warrants that the products and/or services to be provided under this agreement comply with the W3C’s Web Content Accessibility Guidelines (WCAG) 2.0 Level AA and the Web Accessibility Initiative Accessible Rich Internet Applications Suite (WAI-ARIA) 1.1 for web content

The Contractor agrees to promptly respond to and resolve any complaint regarding accessibility of its products or services which is brought to its attention and Contractor further agrees to indemnify and hold harmless the University of Maine System from any claim arising out of its failure to comply with the aforesaid requirements.

The University, at its discretion, may at any time test the Contractor’s products or services covered by this agreement to ensure compliance with the above standards.

Complaints, or testing, that results in findings of non-compliance, that are not corrected within 30 days of being reported to the Contractor in writing, shall constitute a breach of this agreement and shall be grounds for termination of this agreement and a pro-rated refund of fees paid by the University.

6. **Standards for Safeguarding Information:** The Contractor is expected to comply with these standards as outlined in *Rider C - University of Maine System Standards for Safeguarding Information*. Should the Contractor fail to comply with the standards and is unable to reasonably cure its noncompliance within 60 days, the University may terminate this agreement. The University will be entitled to receive a prorated refund measured from the effective date of the termination.

7. **Implementation Plan and Timeline:** The Contractor is expected to develop, manage and report the status of the progress on the implementation plan and timeline as outlined in ***Rider E – Implementation Plan and Timeline***, of this Agreement.
8. **Service Level Agreement:** The Contractor is expected to provide, monitor performance and provide reports of its service delivery commitments to the University as outlined in ***Rider F – Contractor’s Service Level Agreement to Support the University***, of this Agreement.

**RIDER A-1  
PRICING**

**<< BID INSTRUCTIONS - Details in Exhibit 1 will be inserted here during Agreement negotiations.  
No action needed for Bidder as part of their submission. >>**

## RIDER B INSURANCE REQUIREMENTS

Contractor's Liability Insurance: During the term of this agreement, the Contractor shall maintain the following insurance:

#	Insurance Type	Coverage Limit
1	Commercial General Liability, including Product's and Completed Operations  (Written on an Occurrence-based form) (Bodily Injury and Property Damage)	\$1,000,000 per occurrence or more
2	Vehicle Liability (Including Hired & Non-Owned) (Bodily Injury and Property Damage)	\$1,000,000 per occurrence or more
3	Workers Compensation (In Compliance with Maine and Federal Law)	Required for all personnel
3	Professional Liability Insurance (Agents, Consultants, Brokers, Lawyers, Financial, Engineers, or Medical Services)	\$1,000,000 per occurrence or more

Coverage limit requirements can be met with a single underlying insurance policy or through the combination of an underlying insurance policy plus an Umbrella insurance policy.

**The University of Maine System shall be named as Additional Insured on the Commercial General Liability insurance.**

Certificates of Insurance for all of the above insurance shall be filed with:

**University of Maine System  
Risk Manager  
Robinson Hall  
46 University Drive  
Augusta, Maine 04330**

Certificates shall be filed prior to the date of performance under this Agreement. Said certificates, in addition to proof of coverage, shall contain the standard statement pertaining to written notification in the event of cancellation, with a thirty (30) day notification period.

The University reserves the right to change the insurance requirement or to approve alternative insurances or limits, at the University's discretion.

**RIDER C**  
**UNIVERSITY OF MAINE SYSTEM**  
**STANDARDS FOR SAFEGUARDING INFORMATION**

This Attachment addresses the Contractor's responsibility for safeguarding Compliant Data and Business Sensitive Information consistent with the University of Maine System's Information Security Policy and Standards. (infosecurity.maine.edu)

Compliant Data is defined as data that the University needs to protect in accordance with statute, contract, law or agreement. Examples include Family Educational Rights and Privacy Act (FERPA), Health Insurance Portability and Accountability Act (HIPAA), Gramm-Leach-Bliley Act (GLBA), Maine Notice of Risk to Personal Data Act, and the Payment Card Industry Data Security Standards (PCI-DSS).

Business Sensitive Information is defined as data which is not subject to statutory or contractual obligations but where the compromise or exposure of the information could result in damage or loss to the University.

1. Standards for Safeguarding Information: The Contractor agrees to implement reasonable and appropriate security measures to protect all systems that transmit, store or process Compliant Data and Business Sensitive Information or personally identifiable information from Compliant Data and Business Sensitive Information furnished by the University, or collected by the Contractor on behalf of the University, against loss of data, unauthorized use or disclosure, and take measures to adequately protect against unauthorized access and malware in the course of this engagement.
  - A. Compliant Data and Business Sensitive Information may include, but is not limited to names, addresses, phone numbers, financial information, bank account and credit card numbers, other employee and student personal information (including their academic record, etc.), Driver's License and Social Security numbers, in both paper and electronic format.
  - B. If information pertaining to student educational records is accessed, transferred, stored or processed by Contractor; Contractor shall protect such data in accordance with FERPA.
  - C. If information pertaining to protected health information is accessed, used, collected, transferred, stored or processed by Contractor; Contractor shall protect such data in accordance with HIPAA and Contractor shall sign and adhere to a Business Associate Agreement.
  - D. If Contractor engages in electronic commerce on behalf of the University or cardholder data relating to University activities is accessed, transferred, stored or processed by Contractor; Contractor shall protect such data in accordance with current PCI-DSS guidelines.
  - E. If information pertaining to protected "Customer Financial Information" is accessed, transferred, stored or processed by Contractor; Contractor shall protect such data in accordance with GLBA.
2. Prohibition of Unauthorized Use or Disclosure of Information: Contractor agrees to hold all information in strict confidence. Contractor shall not use or disclose information received from, or created or received by, Contractor on behalf of the University except as permitted or required by this Agreement, as required by law, or as otherwise authorized in writing by the University.
3. Return or Destruction of Compliant or Business Sensitive Information:
  - A. Except as provided in Section 3(B), upon termination, cancellation, or expiration of the Agreement, for any reason, Contractor shall cease and desist all uses and disclosures of Compliant Data or Business Sensitive Information and shall immediately return or destroy (if the University gives written permission to destroy) in a reasonable manner all such information received from the University, or created or received by Contractor on behalf of the University, provided, however, that Contractor shall reasonably cooperate with the University to ensure that no original information records are destroyed. This provision shall apply to information that is in the possession of subcontractors or agents of Contractor. Contractor shall retain no copies of University information, including any compilations derived from and allowing identification of



- any individual's confidential information. Except as provided in Section 3(B), Contractor shall return (or destroy) information within 30 days after termination, cancellation, or expiration of this Agreement.
- B. In the event that Contractor determines that returning or destroying any such information is infeasible, Contractor shall provide to University notification of the conditions that make return or destruction infeasible. Upon mutual agreement of the Parties that return or destruction of such information is infeasible, Contractor shall extend the protections of this Agreement to such information and limit further uses and disclosures of such information to those purposes that make the return or destruction infeasible, for so long as Contractor maintains such information.
- C. Contractor shall wipe or securely delete Compliant Data or Business Sensitive Information and personally identifiable information furnished by the University from storage media when no longer needed. Measures taken shall be commensurate with the standard for "clearing" as specified in the National Institute of Standards and Technology (NIST) Special Publication SP800-88: Guidelines for Media Sanitization, prior to disposal or reuse.
4. Term and Termination:
- A. This Attachment shall take effect upon execution and shall be in effect commensurate with the term of the Agreement
5. Subcontractors and Agents: If Contractor provides any Compliant Data or Business Sensitive Information received from the University, or created or received by Contractor on behalf of the University, to a subcontractor or agent, the Contractor shall require such subcontractor or agent to agree to the same restrictions and conditions as are imposed on Contractor by this Agreement.
6. Contractor shall control access to University data: All Contractor employees shall be adequately screened, commensurate with the sensitivity of their jobs. Contractor agrees to limit employee access to data on a need-to-know basis. Contractor shall impose a disciplinary process for employees not following privacy procedures. Contractor shall have a process to remove access to University data immediately upon termination or re-assignment of an employee by the Contractor.
7. Unless otherwise stated in the agreement, all Compliant Data or Business Sensitive Information is the property of the University and shall be turned over to the University upon request.
8. Contractor shall not amend or replace University-owned hardware, software or data without prior authorization of the University.
9. If mobile devices are used in the performance of this Agreement to access University Compliant Data or Business Sensitive Information, Contractor shall install and activate authentication and encryption capabilities on each mobile device in use.
10. Reporting of Unauthorized Disclosures or Misuse of Information: Contractor shall report to the University any use or disclosure of Compliant Data or Business Sensitive Information not authorized by this Agreement or in writing by the University. Contractor shall make the report to the University not more than one (1) business day after Contractor learns of such use or disclosure. Contractor's report shall identify; (i) the nature of the unauthorized use or disclosure, (ii) the information used or disclosed, (iii) who made the unauthorized use or received the unauthorized disclosure, (iv) what Contractor has done or shall do to mitigate the effects of the unauthorized use or disclosure, and (v) what corrective action Contractor has taken or shall take to prevent future similar unauthorized use or disclosure. Contractor shall provide such other information, including a written report, as reasonably requested by the University. Contractor shall keep University informed on the progress of each step of the incident response. Contractor shall indemnify and hold University harmless from all liabilities, costs and damages arising out of or in any manner connected with the security breach or unauthorized use or disclosure by Contractor of any University Compliant Data or Business Sensitive Information. Contractor shall mitigate, to the extent practicable, any harmful effect that is known to Contractor of a security breach or use or disclosure of Compliant Data or Business Sensitive Information by Contractor

in violation of the requirements of this Agreement. In addition to the rights of the Parties established by this Agreement, if the University reasonably determines in good faith that Contractor has materially breached any of its obligations, the University, in its sole discretion, shall have the right to:

- Inspect the data that has not been safeguarded and thus has resulted in the material breach, and/or
- Require Contractor to submit a plan of monitoring and reporting, as the University may determine necessary to maintain compliance with this Agreement; and/or Terminate the Agreement immediately.

11. Survival: The respective rights and obligations of Contractor under Section 12 of the Agreement or Section 3 of this Attachment shall survive the termination of this Agreement.

12. Contractor Hosted Data: If Contractor hosts University Compliant Data or Business Sensitive Data, in or on Contractor facilities, the following clauses apply.

- A. Contractor computers that host University Compliant Data or Business Sensitive Information shall be housed in secure areas that have adequate walls and entry control such as a card controlled entry or staffed reception desk. Only authorized personnel shall be allowed to enter and visitor entry will be strictly controlled.
- B. Contractor shall design and apply physical protection against damage from fire, flood, earthquake, explosion, civil unrest, and other forms of natural or man-made disasters. Contractor shall protect hosted systems with Uninterruptible Power Supply (UPS) devices sufficient to meet business continuity requirements.
- C. Contractor shall backup systems or media stored at a separate location with incremental back-ups at least daily and full back-ups at least weekly. Incremental and full back-ups shall be retained for 15 days and 45 days respectively. Contractor shall test restore procedures not less than once per year.
- D. Contractor shall provide for reasonable and adequate protection on its network and system to include firewall and intrusion detection/prevention.
- E. Contractor shall use strong encryption and certificate-based authentication on any server hosting on-line and e-commerce transactions with the University to ensure the confidentiality and non-repudiation of the transaction while crossing networks.
- F. The installation or modification of software on systems containing University Compliant Data or Business Sensitive Information shall be subject to formal change management procedures and segregation of duties requirements.
- G. Contractor who hosts University Compliant Data or Business Sensitive Information shall engage an independent third-party auditor to evaluate the information security controls not less than every two (2) years. Such evaluations shall be made available to the University upon request.
- H. Contractor shall require strong passwords for any user accessing personally identifiable information or data covered under law, regulation, or standard such as HIPAA, FERPA, or PCI. Strong passwords shall be at least eight characters long; contain at least one upper and one lower case alphabetic characters; and contain at least one numeric or special character.

13. If the Contractor provides system development, Compliant Data or Business Sensitive Information shall not be used in the development or test environments. Records that contain these types of data elements may be used if that data is first de-identified, masked or altered so that the original value is not recoverable. For programs that process University data, initial implementation as well as applied updates and modifications must be produced from specifically authorized and trusted program source libraries and personnel. Contractor shall provide documentation of a risk assessment of new system development or changes to a system.

**RIDER D**  
**SERVICES ENGAGEMENT FORM**  
**Services Engagement to Agreement for Services**

This Services Engagement is entered into as of the date written below between \_\_\_\_\_ (“Contractor”) and \_\_\_\_\_ (“Institution”).

This Services Engagement shall be governed by the terms and conditions of the Master Level Agreement for Services dated \_\_\_\_\_ by and between \_\_\_\_\_ (“Contractor”) and the University of Maine System, and is incorporated herein by reference.

This Services Engagement describes the Services to be provided by \_\_\_\_\_ (“Contractor”) and the fees associated with such Services.

**INSTITUTION REPRESENTATIVE & PROJECT MANAGER:**

**CONTRACTOR REPRESENTATIVE & PROJECT MANAGER:**

**SCOPE OF WORK:**

**TERM:**

The term of this Work Order will be from \_\_\_\_\_ to \_\_\_\_\_.

Installation of the \_\_\_\_\_ shall be Substantially Complete on or before \_\_\_\_\_ subject to adjustments mutually agreed to by the parties.

**PRICE:**

**SIGNATURES:**

**Institution**

By: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

**Contractor**

By: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

**Chief Information Officer approval is required of any University of Maine System information technology service engagements.**

BY: \_\_\_\_\_

Title: \_\_\_\_\_

Chief Information Officer or designee

Date: \_\_\_\_\_

**RIDER E  
IMPLEMENTATION PLAN AND TIMELINE**

**<<BID INSTRUCTIONS – Bidders will insert their implementation plan and timeline here as part of their proposal/bid submission. >>**

## RIDER F

### CONTRACTOR’S SERVICE LEVEL AGREEMENT TO SUPPORT THE UNIVERSITY

#### 1. INTRODUCTION

##### 1.1 Purpose

The purpose of this Service Level Agreement (SLA) is to identify and set expectations for the delivery of services to the University of Maine System (UMS), in support of event management solution.

##### 1.2 UMS Operating Hours

Academics: 7am to 10pm M-F (Eastern)

Business: 8am to 5pm M-F (Eastern)

#### 2. SCOPE OF SERVICES

The software solution will support all aspects of events management for the University including Conferences and Institutes, Cooperative Extension, Hutchinson Center, Darling Marine Center, and Auxiliary Services. This includes online registration, event management, housing, catering, room scheduling and work order generation, reporting, marketing/client information, accounts receivable/payable, budgeting, PCI compliant web payments, and Customer Relationship Management (CRM) capability. Multiple work units at UMaine are charged with managing all aspects of event managements, including the renting of university space to outside groups. The software will assist UMaine's units with management and tracking of its event management process, including logistics.

#### 3. SERVICE LEVELS

This section describes the priority levels and response times for all incidents & requests logged with the contractor.

**3.1 Minimum Compliance Target** – Provide 99.9% uptime for the website and event management solution. A minimum of 98% of incidents & requests, shall be resolved within the resolution times included herein. General Incident/Request Time to Resolution shall apply to incidents or requests that are not specifically listed below.

##### 3.2 Service Severity

3.2.1 The University will set the severity for all incidents & requests. When a severity is not explicitly provided, the default severity of “normal” will apply to that incident/request.

##### 3.2.2 Severity Table

Priority	Definition
Severity 1 – Critical	Issue affecting a large group of customers and/or business critical functions or essential services, or an “Urgent” request or incident for which the service target was not met.
Severity 2 – Urgent	University business-disruptive issue affecting a small group, or a serious, but not business-disruptive issue affecting a large group. Also, a “Normal” severity request or incident for which the service target was not met.
Severity 3 – Normal	A reasonable workaround is available for the request or incident. University operations are largely unaffected.

##### 3.3 Resolution Time Definition

Resolution time is the time taken from the University’s report of the incident, or request, to the contractor, until the service is restored or the request is fulfilled. Whether the service has been

restored, or request fulfilled, is normally determined by the University within the scope and responsibilities laid out for the service in the contract and this agreement.

### 3.4 Contractor Business Hours.

All times are in, or indicated relative to, local University of Maine time.

Contractor Business Hours (*contractor provides here*)

### 3.5 Incident/Request - Time to Resolution by Service and Severity - General Issues

These time to resolution commitments apply to issues not covered in 3.6 All durations are in business time.

Measure	Critical	Urgent	Normal
Customer Outward Facing (e.g. event registration)	4 hours	1 day	2 days
Health and/or Safety Concerns (e.g. review of bed decks)	4 hours	1 day	2 days
Availability for Backend Functionality (e.g. event scheduling, setup, reporting)	4 hours	1 day	2 days
Other Services	1 day	1 day	2 days

### 3.6 Other Incident/Request/Process Resolution Times

Event Management	Resolution Time
Event Organizer online scheduling, including components, such as, housing, food, venue equipment, etc	1 business day
Event Participants event/workshop registrations and payment options online.	1 business day
Communicate of event details with Event Organizer and Event Participants	1 business day
System availability and accuracy for event management solution	99.9% availability and accuracy

## 4 MANAGEMENT OF SERVICES

### 4.1 Contact with Contractor's Service Desk

UMS will contact the Contractor via the following methods for each service area. Contact points may differ for each service based on whether the contact is for an incident or request and based on severity.

All University contact with the Contractor for incidents and service requests regarding services described in the SLA will be logged by the contractor and is required to meet reporting requirements.

Service	Contractor Service Contact Points
Customer Outward Facing (e.g. event registration)	

Health and/or Safety Concerns (e.g. review of bed decks)	
Availability for Backend Functionality (e.g. event scheduling, setup, reporting)	
Other – Please Specify	
Other – Please Specify	

#### 4.2 Incident & Request Prioritization

The University contact will be asked by the contractor to set the incident/request severity. Failure by the contractor to request from the university and set an incident/request severity will automatically designate that incident/request as “urgent”.

#### 4.3 SLA Escalation Process

The following contractor escalation contacts are for the use of University IT personnel when any SLA in this agreement risks being, or already has been, exceeded. For each new SLA exception, University personnel will start with the 1st point of escalation, unless instructed otherwise by the Contractor. Contractor will ensure that these contact points are updated and communicated to the University as they change. In the case of multiple similar Service Level violations, the University may escalate directly to 2nd or 3rd level contractor contacts.

Escalation Point	Description
Title: Name: Phone: Email:	1 <sup>st</sup> point of escalation when service levels are not met. Substantive response within 1 business day.
Title: Name: Phone: Email:	2 <sup>nd</sup> point of escalation when service levels are not met. Substantive response within 4 business hours.
Title: Name: Phone: Email:	Final point of escalation when service levels are not met. Substantive response within 2 business hours.

4.4 Service Management Processes - List, or refer to additional documentation of, any service management process the University will be required to follow, such as Change, Problem, and/or Incident Management.

### 5 REPORTING REQUIREMENTS

The following sections outline the reporting provided as part of the SLA. Reports will be provided on a monthly basis.

#	Performance Measure	Frequency	Format	Reporting Requirement
	Service Levels identified in Section 3	Quarterly	Excel	<ul style="list-style-type: none"> <li>% of events in compliance with the service level target</li> </ul>
<b>Reports In addition to general reporting of SLAs in Section 3:</b>				
1	Customer Outward Facing (e.g. event registration)	Quarterly / On Demand	Excel	<ul style="list-style-type: none"> <li>By “Event Type”, Section 3.5</li> <li>By Event Location</li> <li>% of events delivered within target</li> </ul>

	Health and/or Safety Concerns (e.g. review of bed decks)  Availability for Backend Functionality (e.g. event scheduling, setup, reporting)			
2	Event creation and participant registration system availability	Quarterly/ On Demand		<ul style="list-style-type: none"> <li>• % uptime and performing normally DURING UNIVERSITY BUSINESS HOURS</li> </ul>
3	Event History	Monthly / On Demand	Excel	<ul style="list-style-type: none"> <li>• Rolling 12-month monthly totals</li> <li>• 12 month aggregate total</li> <li>• By Event Type and Event Location</li> </ul>
4	Event History	On Demand	Web	<ul style="list-style-type: none"> <li>• Selectable start and finish dates</li> </ul>



## Appendix E – Organization Reference Form

**Respondent's Organization Name:** \_\_\_\_\_

**INSTRUCTIONS:** Provide a minimum of three (3) current professional references who may be contacted for verification of the Respondent's professional qualifications to meet the requirements set forth herein. We strongly prefer references from higher education institutions similar in size and requirements to the University of Maine System, including those with multi-campus integrated solutions.

We request that the references include one long-standing customer (minimum of 3 year engagement) and one new customer (one who has been engaged with Respondent for less than one year).

REFERENCE #1	
Institution/Company Name	
Contact Name	
Contact Title	
Contact Phone Number	
Contact eMail Address	
Relationship Length	

REFERENCE #2	
Institution/Company Name	
Contact Name	
Contact Title	
Contact Phone Number	
Contact eMail Address	
Relationship Length	

REFERENCE #3	
Institution/Company Name	
Contact Name	
Contact Title	
Contact Phone Number	
Contact eMail Address	
Relationship Length	

REFERENCE #4	
Institution/Company Name	
Contact Name	
Contact Title	
Contact Phone Number	
Contact eMail Address	
Relationship Length	

## Appendix F – Evaluation Question(s) - Organization, Qualifications and Experience

Respondent's Organization Name: \_\_\_\_\_

**INSTRUCTIONS:** Respondents shall ensure that all information required herein is submitted with the response. All information provided should be verifiable by documentation requested by the University. Failure to provide all information, inaccuracy or misstatement may be sufficient cause for rejection of the response or rescission of an award. Respondents are encouraged to provide any additional information describing operational abilities.

### Evaluation Question(s)

1. Provide a statement describing your company to include name, number of employees, locations, number of years in business, number of years offering/supporting the proposed solution, and any and all acquisitions or mergers in the last five years. Is the company publicly or privately held?
2. If subcontractors are to be used, provide a list that specifies the name, address, phone number, contact person, and a brief description of the subcontractors' organizational capacity and qualifications.
3. Please provide information about contract cancellations or non-renewals your company has experienced over the last three years.
4. Describe your experience offering a solution for the business requirements identified in this document within higher education. Provide a client list that includes any and all higher education clients.
5. Provide a statement that explains why your company would be most qualified to provide products and services to the University of Maine System. What differentiates you from your competitors? In the response the Respondent must demonstrate that they are a recognized leader in the services and/or products covered in this document.
6. Financial Stability  
No financial statements are required to be submitted with your responses, however, prior to an award the University may request audited financial statements from your company, credit reports and letters from your bank and suppliers.
7. Provide a statement that notes your acceptance to the conditions stated in Section 1.2 of the RFP regarding the University of Maine System, Contract for Services or note your non-acceptance to the stated conditions. For full acceptance please include a statement here to the effect as part of your response. For partial acceptance please provide the clause number and name for the exceptions and note your understanding that finalists will be required to provide marked up language acceptance as part of your response for full evaluation of this requirement, lack of providing the required response will result in a zero (0) score for the Contract for Services evaluation criteria in Section 2.1.1.

## Appendix G – Evaluation Question(s) –Implementation, Training, Support and Reporting

**Respondent's Organization Name:** \_\_\_\_\_

All responses to the questions will reflect what is offered as part of the Respondent's proposed solution. Respondents **MUST** indicate if the product or service requires modification, additional products or services, or if any other accommodation would be necessary to meet a requirement.

### Evaluation Question(s) – Specifications / Scope of Work

1. Describe your firm's understanding of the current higher education needs for providing the products / services described in **Specifications / Scope of Work** detailed in this document. In addition to addressing the specific questions below, include in your response what challenges do higher education organizations face in this area how would your solution support our goals?

#### Software and Systems:

- a. Describe your technical experience in supporting and managing your software and systems?
- b. Describe any technical options for integrating institutional data with your software and systems?
- c. Please confirm that the solution offered provides the potential for integration with the following systems. For each confirmed system, please briefly describe the recommended integration tool(s)/strategies and provide an example of a school or system currently utilizing such integration:
  - Peoplesoft (Campus Solutions)
  - AssetWorks AiM (Facilities Management Software)
  - Caterease (Catering System)
  - Collegenet/25 Live (Room Scheduling System)

### Evaluation Question(s) – Implementation Questions

1. Describe your recommended implementation strategy, best practice consulting options, and professional services. The University of Maine System requires the review of consultant's credentials/experience and reserves the right to request replacement if he/she fails to meet expectations at any time.
2. Describe your project management approach. What project management tools do you use? Describe the project management offered as part of a standard implementation.
3. Indicate your timeline from implementation start to "go live" date. Implementation may take place in stages. Provide task lists and timelines which shows the order in which key features would be implemented in a standard implementation. This document will be included in the **Contract for Services, Rider E**.
4. Outline the staffing and composition of the implementation team. Include University staff and roles, Respondent staff and roles, and proposed hours required for successful implementation.
5. Implementation roles and responsibilities - Please elaborate on the project team required and time commitment to implement your software including functional and technical resources within the University. A sample project plan would be helpful.
6. Identify any third party Respondents involved in your implementation strategy and describe these relationships. Indicate whether these relationships are required or optional for implementation of the proposed solution. Be sure to detail associated costs and requirements related to the third party Respondent.

### Evaluation Question(s) – Training Questions

1. Describe the training options available in support of this product and implementation. Include training for functional and technical users. Describe how training approaches will vary for each portal and user (teacher, student, coordinator, guidance counselor, parent).
2. Describe the training methods available such as on-site, online instructor led, online self-help, documentation, etc.
3. Describe your training best practices and what you would recommend for a successful implementation of this product.

### Evaluation Question(s) – Support Questions

1. Supply your firm's mission statement or policy regarding customer satisfaction and support.
2. Describe your incident, request and problem management processes. Describe these processes in terms of how the client submits a request, such as thru a service desk or website, and how you respond, thru resolution. What is the standard wait time for an initial response? Provide an example.
3. Describe how you manage on-going contact with your clients. Would the University of Maine System be assigned an account manager? What expertise would that person have to support our needs? What is the ongoing relationship between the account manager, support, and the product developers?
4. Please provide a copy Service Level Agreement (SLA) related to your services this document must address the information provided in **RFP Appendix E, Rider F**. A copy of **RFP Appendix E, Rider F** with any adjustments must be provided in response to this question. The SLA will become part of the resulting **Contract for Services, Rider F**.
5. Please provide a detailed account of your actions should you miss a Service Level Agreement (SLA) requirement, if applicable. Include a description of the actions you would take to assure the lapse did not occur again.
6. Include a statement that notes your acceptance to the conditions stated in **RFP Appendix E, University of Maine System, Contract for Services, Rider C. Standards for Safeguarding Information**, as part of the agreement
7. Please provide a detailed account of your actions should you miss a Service Level Agreement (SLA) requirement. Include a description of the actions you would take to assure the lapse did not occur again. Would the University of Maine System be eligible for subscription fee credits as a result of the lapse?

### Evaluation Question(s) - Reporting

1. Does the system offer a set of delivered reports?
  - a. Please describe, specifically identifying the most commonly used reports
  - b. Provide examples/screen shots of delivered reports of various types.
  - c. Are the delivered reports customizable?
2. Describe any dashboards the system may offer.

- a. Describe and provide screenshots of this solution’s BI visualization tool capabilities.
  - b. Describe, or provide examples/screen shots of, options for dashboard content.
  - c. Are they customizable, and if so, in what ways?
  - d. Can different users set up different dashboard content?
3. Describe in detail how the system can be used to generate ad-hoc and customized reports and what is the skill set needed to generate reports.
  4. Can reports be scheduled to run automatically and emailed to specific individuals, or groups of individuals? Please explain.
  5. Does the product have the ability to export data into a spreadsheet/database for querying and reporting?
    - a. Explain the methods by which this may be accomplished.
    - b. List the data export formats that this solution supports (e.g. tsv/csv, Microsoft Excel, XML, HTML, proprietary format, etc.)
  6. Does the system have integrations with third party reporting tools? If so, please explain.
  7. Reporting security – Does the reporting security correlate to the security in the system?

## Appendix H – Business Requirements Matrix

All responses to the questions will reflect what is offered as part of the Respondent's proposed solution. Respondents **MUST** indicate if the solution offered meets the requirement stated by entering "Yes", "No" or "Partial".

- **YES** - This response indicates the Respondents' solution includes the requirement.
- **PARTIAL** – This response indicates the Respondents' solution meets the requirement partially.
- **NO** – This response indicates the Respondents' solution does NOT include the business functionality noted in the requirement.

If you answer "Partial" or "No" please provide the clarification in the Explanation column for what can be done to meet the requirement. You must indicate whether the enhancement is included in the cost for the solution provided in the Appendix C – Cost Exhibits or if it is an additional cost. If there is an additional cost please include it in Cost Exhibit 1 – Table 3 with a reference back to this requirement. Also we are asking that you provide an approximate timeline for completing the work.

Your submission of this form must include an **MS Excel Version** of this document for ease of evaluation. For a copy of the excel version of Appendix H(a) contact the Proposal Contact identified on the cover page of this document.

#	Category	Description	Importance	Bidder Response (enter one) Yes/Partial/No	If PARTIAL or NO please explain.
1	<b>Key Program Features</b>	Solution will provide a comprehensive event management including; billing, housing, dining, equipment registration and online payment for event.	Required		
2		Solution will provide or integrate with a real time, branded, web site and calendar for events and marketing of event capabilities.	Required		
3	<b>Event Scheduling</b>	Solution provides ability to restrict event scheduling and modifications to approved campus staff.	Required		
4		Solution provides graphic calendar used by campus staff to see space availability of <b>housing units</b> (bed decks).	Required		
5		Solution provides graphic calendar used by campus staff to see <b>venues on campus</b> .	Required		
6		Solution provides event organizer ability to request an event online, including components, such as, housing, food, venue equipment, etc	Preferred		
7		Solution provides ability to see venue images to support scheduling activities.	Preferred		
8	<b>Event Setup</b>	Solution provides ability for campus staff to generate a workorders for event catering, venue setup and equipment.	Required		

9		Solution provides API available for integration of work orders with other systems; higher education room scheduling solutions, Asset Works, catering system, etc.	Preferred		
10		Solution provides ability to see floor plans for event setup considerations.	Preferred		
11	<b>Event Registration</b>	Solution provides for event participants to complete event/workshop registrations and payment options online.	Required		
12		Solution provides ability to offer promotion codes for use during the invoicing and payment processing.	Required		
13		Solution provides ability to communicate event details with organizer and participants; (printing or electronic).	Required		
14		Solution provides ability to up sell products (T-shirts, books, etc.) related to the event.	Nice to Have		
15		Solution provides ability to upload participant list in addition to allowing self registrations.	Preferred		
16	<b>Workflow Management</b>	Solution provides ability to document key requirements of moving the event forward (certificates of insurance, media releases, deposits, etc.)	Preferred		
17		Solution provides task management and checklist capabilities.	Preferred		
18	<b>Event &amp; Service Marketing</b>	Provide an integrated, real time, branded, web site for events and marketing of event capabilities.	Required		
19		Provides for creation/promotion of calendar items (events that do not require registration) alongside registration/payment events.	Preferred		
20		Allows for listing of recurring events (both free/walk-in events and those requiring registration)	Preferred		
21	<b>Post Event Activities</b>	Solution provides ability to track and issue certificates for workshop continuing education units	Preferred		
22		Provides ability to send follow-up emails to event participants.	Preferred		
23	<b>Internal User Interface</b>	Solution provides ability to integrate with University payment system, currently TouchNet	Required		
24		Solution provides ability for home page customization and branding.	Preferred		
25		Solution provides access by mobile devices for campus staff and customers.	Preferred		
26	<b>Customer Profile and Information Management</b>	Provide ability to store complete customer contact and demographic data, including multiple phone numbers, street addresses, email addresses, purchase history, etc.	Required		

27		Provide search capabilities via multiple criteria (e.g. last name, id numbers, event location, etc.) and ability to locate duplicate customer records, including deletion and or merging of duplicate records.	Required		
28		Provides ability to group/identify customers for recurring billing, such as membership tiers	Preferred		
29		Provide a contact comment field for logging comments/notes, conversations, time/date stamps, etc.	Preferred		
30		Provide ability to archive customer reports based on existing retention schedules.	Preferred		
31	<b>Integrated Data Warehouse / Analytics</b>	Solution provides ability to generate quote for customers and at event completion generate final invoice possibly split between more than one department.	Required		
32		Provide a standard suite of administrator and end-user dashboards and reports as part of the solution as well as the ability to personalize and customize reports.	Preferred		
32		Provide reports on customer profiles including purchase history, events attended, and demographic information.	Preferred		
33		Provide on demand sales activity reporting with configurable parameters (e.g. date, revenue, event, etc.).	Preferred		
34		Solution provides ability to store account codes which will be used for accounting with Peoplesoft.	Preferred		
35		Solution provides ability to generate contracts (“fill in the blanks” or letters we upload), track release and medical forms, certificate of insurance, etc.	Preferred		
36	<b>System Security / PCI Compliance</b>	Provide flexible payment processing options - i.e. Can the University collect all of the funds or can the system provider	Required		
37		Provide a solution that is compliant with Payment Card Industry (PCI) Data Security Standards.	Required		
38		Provide a PCI validated Point to Point Encryption (P2PE) solution	Required		
39		Provide systems mechanisms to detect and protect client/personal confidential information, commercial misuse, and hacking	Preferred		
40		Provide protections against anti-fraud, anti-thief, robot attacks and anti-malice	Preferred		
41		Include system security intrusion incident handling procedures, including methodology used to determine incident severity and timeline for escalation	Preferred		



42	<b>Forms &amp; Correspondence</b>	Solution provides ability to brand external communications and customer forms / information.	Preferred		
43	<b>Reporting</b>	Solution provides access to real-time data and offers custom report capabilities for common business support such as, financials (profit and loss, balance due, collection, year to date financial outlook, audit reports, revenue).	Required		
44		Solution provides ability to run usage reports by event location and category of client (non-profit, internal, external, etc.)	Preferred		
45		Solution provides space utilization reporting including accurate time and events scheduled.	Preferred		
46		Solution provides ability to report and filter by event categories and time frames.	Preferred		
47		Solution provides reports that can be exported into excel, csv, etc.	Preferred		
48	<b>Dedicated Vendor Campus Support /Service</b>	Provide a complete customer support structure – telephone number of support staff, web-based support, hours of operation, and process for prioritizing problems/issues. The University will require standard technical support Eastern Standard Time (EST), as well as emergency service 24/7, 365 days.	Required		
49		Appropriate notification by vendor to customer for all schedule maintenance.	Required		
50		Solution provides support through a website, accessible to users of assistive technology, with options for email, phone, and/or online chat contact.	Required		
51		Provide ongoing learning and training, including database and process manuals, interface guides and database schemas.	Preferred		
52		Provide an experienced account manager to manage the day to day partnership including relevant work experience with peer college institutions	Preferred		
53		Solution provides a robust online user community and social media forum or mailing list.	Preferred		
54	<b>Technology</b>	Solution provides fully hosted cloud solution.	Preferred		
55		Solution provides hosted (SaaS) service.	Preferred		
56		Solution has potential to provide ability to interface with Peoplesoft updated in real time via Application Program Interface (API) Web Services.	Required		
57		Solution provides technical support accessible via support tickets via web and telephone, during business hours.	Required		

58		Solution provides equal access to persons with disabilities as evidenced by compliance with the W3C's Web Content Accessibility Guidelines (WCAG) 2.0 Level AA and the Web Accessibility Initiative Accessible Rich Internet Applications Suite (WAI-ARIA) 1.1 for web content. Lacking such evidence, the contractor commits to providing evidence of compliance by qualified tester(s) within 6 months of the University's commitment to purchase the solution.	Required		
59		Solution safeguards Compliant Data and Business Sensitive Information consistent with the University of Maine System's Information Security Policy and Standards. (infosecurity.maine.edu)  Compliant Data is defined as data that the University needs to protect in accordance with statute, contract, law or agreement. Examples include Family Educational Rights and Privacy Act (FERPA), Gramm-Leach-Bliley Act (GLBA), Maine Notice of Risk to Personal Data Act, and the Payment Card Industry Data Security Standards (PCI-DSS).	Required		
60		Solution provides ability to perform security audits and access control	Required		
61		Support of all major Web browsers for both PC/Windows and Apple/Mac platforms, such as Chrome, Firefox and Safari.	Required		
62		Solution provides capability to interface with WordPress Plugin to integrate with our current Content Management System, TouchNet and Peoplesoft.	Preferred		
63		Test environment to mirror production	Preferred		
64		Backup of data, archive of data to be kept for 7 years	Required		
65		Monitoring and alerting capability to support 99.9% uptime and two (2) hour recovery time	Preferred		
66		API available for integration with other systems; higher education room scheduling solutions, Asset Works, catering system, etc.	Preferred		
67	<b>Authentication integration</b>	Solution will provide compatibility with the University's Single Sign On (SSO) authentication protocol - Shibboleth.	Required		

## Appendix I – Evaluation - Accessibility Requirements

**Respondent's Organization Name:** \_\_\_\_\_

The University is required by policy and law to procure Information Technology products, services and materials, such as software, hardware, web services, media assets, etc., that provide substantially equivalent opportunity, access and ease of use to persons with disabilities.

### Evaluation Question(s) - Accessibility Standards Compliance

1. If the solution includes any end-user-facing human interface, such as an end-user device software component, web pages, web site, video or audio playback, file upload, mobile device apps, etc., or produces electronic materials such as documents, PDFs, etc., Respondents will submit as part of their bid either, or both, of the following assessments covering all Information Technology-related products, services or components that users, managers, installers, system administrators, etc., are expected to interact with:
  - a. Current and accurate "Voluntary Product Accessibility Template v2.x", or VPAT v2.x, (see <http://www.itic.org/public-policy/accessibility>), to document products and/or services' conformance and deviations from Section 508 of the Rehabilitation Act of 1973.  
  
and/or
  - b. Detailed description of the accessibility features in the bid products and/or services that shows and explains compliance with and deviations from the guidelines of the "[Web Content Accessibility Guidelines \(WCAG\) 2.0 Level AA](#)" and "[Web ARIA 1.1](#)" published by [www.w3.org](http://www.w3.org)

### Evaluation Question(s) - Accessibility Practices

1. If the solution includes any training materials or activities that include any electronic materials or delivery platforms, how do you ensure that such materials and platforms meet disability accessibility requirements, such as Section 508 or WCAG2.0?
2. How do you ensure that your customer support phone lines, help system, customer portal, knowledge base, end-user ticket system, etc., meet disability accessibility requirements, such as Section 508 or WCAG2.0?
3. How do you ensure that software/application changes, patches, new features, etc., do not introduce new disability accessibility errors/issues?
4. How you ensure that all mobile device interfaces to your solution comply with disability accessibility requirements such as Section 508 and/or WCAG2.0.
5. How do you ensure that emails and attachments sent by the software/applications, or by your staff, to University staff, faculty and/or or students, comply with disability accessibility requirements, such as Section 508 or WCAG2.0.
6. How do you ensure that all reports produced by the software/application meet disability accessibility requirements, such as Section 508 and/or WCAG2.0, and that any PDF-formatted reports also meet these requirements?

## Appendix J – Evaluation Question(s) – Information Security

**Respondent's Organization Name:** \_\_\_\_\_

All responses to the questions will reflect what is offered as part of the Respondent's proposed solution. Respondents **MUST** indicate if the product or service requires modification, additional costs, products or services, or if any other accommodation would be necessary to meet a requirement.

### Evaluation Question(s) – Technical Security Evaluation

1. Is any of your solution cloud-based, Software as a Service (SaaS) or hosted on any system that is not operated by the University of Maine System or is any sensitive data transmitted, stored, or processed by the bidder or a contractor of the bidder?

If the answer to Question 1 is yes, fill out the attached Educause-created Higher Education Cloud Vendor Assessment Tool - Lightweight version ([HECVAT-Lite](#)) spreadsheet. If the bidder has a previously completed full version of this tool ([HECVAT](#)), it can be submitted in lieu of the "lite" version.

When addressing HLAA-01 regarding password complexity the institution's password complexity is as follows: *At least eight characters length, contain at least one upper and one lowercase alphabetic characters, contain at least one numeric or special character, be changed at least annually and not be reused for at least 2 years.*

Supplementary information that helps address the questions or describes the information security program and controls (such as a diagram for question HLAP-05) is welcome but is not to be substituted for answering the questions.

2. Does your product process protected health information (PHI) or any data covered by the Health Insurance Portability and Accountability Act (HIPAA)?

If the answer to Question 2 is yes, provide us with your latest HIPAA audit results. You will also be required to sign a business associate agreement.

3. Does your solution involves processing credit or debit card payment transactions?

If the answer to Question 3 is yes, provide your latest attestation of compliance (AoC) or Report on Compliance (RoC) and answer the questions below:

- a. Describe all the payment methods you would support (i.e. card-present, card-not-present, and e-commerce transactions as applicable).
- b. Do you intend on processing transactions using your merchant account or the University's merchant account?
- c. What processors are involved in transactions and do you support payments involving Touchnet?
- d. Comment on the level of compliance self-assessment (e.g. SAQ A, B, P2PE-HW, SAQ D) would the University likely be required to meet with your proposed solution? We understand any final determination of self-assessment is determined between the University and our QSA.

4. Is your company a consulting firm providing only consultation to the Institution?

If the answer to Question 4 is yes, answer the following questions:

- a. Will the consulting take place on-premises or remotely?
- b. Will the consultant require access to institution network resources?
- c. Will the consultant require access to hardware in the university data centers?
- d. Will the consultant require an account within the institutions domain (@.edu)?
- e. Has the consultant received training on sensitive data handling?
- f. Will any data be transferred to the consultant's possession?

- g. How long will it remain in their possession?
  - h. It is encrypted (at rest) while in the consultant's possession?
  - i. Will the consultant need remote access to the institution's network or systems?
  - j. What software will be used to facilitate that access?
  - k. Can we restrict that access based on source IP address?
5. Do you require Social Security Numbers to be used in your system?  
If the answer to question 5 is yes, please explain the purpose of using this high-risk data element.
6. Include a statement that notes your acceptance to the conditions stated in **University of Maine System, Contract for Services, Rider C. Standards for Safeguarding Information**, as part of the agreement.

## Appendix K – Evaluation Question(s) - Information Technology

**Respondent's Organization Name:** \_\_\_\_\_

All responses to the questions will reflect what is offered as part of the Respondent's proposed solution. Respondents **MUST** indicate if the product or service requires modification, additional costs, products or services, or if any other accommodation would be necessary to meet a requirement.

### Evaluation Question(s) - General Technical

1. Please describe your offering as a Service (SaaS)/hosted, and/or University onsite deployment environments.
  - a. If onsite, detail the hardware, core product software, storage, and database requirements of each environment.
    - i. Define server requirements and provide specifications (including recommended operating systems, web server software, etc.)
    - ii. Define the minimum desktop workstation hardware and software requirements mandated by the proposed solution.
    - iii. Describe details of network communications required between the web server, app server, database server, and any other required servers.
  - b. If SaaS/hosted, list normal scheduled downtime frequency, standard day/time slots, etc.
2. Describe deployment instances of the environment, such as test, development and production. Are all of the instances available to the UMS? If yes, detail the types of instances and how access to these instances would be provided.
3. Identify which components of your products or services are provided by third-party technology partners. This includes OEM software, hosting, internal application network, etc.
  - a. Describe the underlying technologies for the component(s).
  - b. Provide the third-party technology partner(s) name(s), address(es) and contact(s).
  - c. Explain additional costs or fees associated with the components.
4. Describe practices and policies related to data stored by this solution.
  - a. Clarify the data ownership rights and responsibilities of the parties and provisions for the University obtaining the data as needed even if the contract is terminated.
  - b. Indicate types of data stored especially if any data is protected (HIPAA, FERPA, etc.).
  - c. Indicate how long data is stored or archived.
  - d. Describe the technology, practices and policies you have in place that would protect the UMS data from unauthorized access and use.
5. If your solution is SaaS/hosted, provide a description of your business continuity management practice.
  - a. If the software is deployed in multiple sites (data centers), how often is data synchronized between the data centers?
  - b. Describe your strategies for minimizing downtime in the event of a catastrophic failure of the hosting environment(s) or components.
    - i. Would the UMS experience any loss of data as a result of downtime, system problems or catastrophic failure? If so, describe the situations that could result in loss of UMS data.
    - ii. How much downtime should we expect for a catastrophic failure?

6. Provide a description of your change management practice for all hardware and software components.
  - a. How often is the software updated and releases made available?
  - b. How are we notified?
  - c. Are updates and upgrades opt-in or mandatory?
  - d. What provisions do you have for managing customization requested by the UMS?
  - e. How are the updates accomplished?
  - f. How do you ensure that the system functionality is sufficiently tested before changes go into production?
  - g. What are the UMS options, roles and responsibilities for reviewing and approving changes?
7. Provide detailed information regarding browser requirements for the software proposed to meet the functionality and system requirements of this RFP, including any specific required versions and/or add-ins.
8. Describe the mobile capabilities available with the proposed solution.
  - a. Indicate supported mobile platforms.
  - b. Describe implementation of mobile capabilities (i.e. mobile-enabled, apps, etc.)
  - c. Explain how and when mobile updates are provided.
9. While importing data from the UMS sources, does your company provide full data hygiene, including comparing several data sources, and removal of duplicate records.
10. Does your solution provide data exports for upload to the UMS systems? If so, please describe the types of information exported and the process employed.
11. Does your solution have the ability to automate data importing and exporting?
12. Does this solution come with a comprehensive data dictionary of the database?
13. Describe the ability to add fields and tables to the database for University needs.
14. Do you plan to offer a solution to integrate with an Identity Management System?
  - a. If so, describe how you deliver this solution.
  - b. Does your solution offer capabilities to use CAS or Shibboleth for Single Sign-On (SSO)? If not, then what do you offer?
  - c. Describe your SSO implementation requirements.
  - d. Do you deliver an API that would allow for the remote management of user authorization data? If so, describe how you deliver this solution.
15. Describe the ongoing functions to be performed by the University systems administrator and applications administrator?
16. What is the maximum number of concurrent users logged in simultaneously your system can support? Describe how your system defines concurrent users.

**Evaluation Question(s) - Multi-Institution Capabilities**

The University of Maine System consists of seven unique institutions throughout the state together with a system office. Thus, there are a total of eight business units maintained within our financial system. Given the nature of our multi-institution structure:

1. Explain in detail the operational options available to us in your solution, including what can be done, what cannot be done, methods, alternatives, business impacts, and pricing/licensing impacts, related to multi-institution use.
2. Could multiple institutions operate in a single instance with security to ensure the compartmentalization of data by institution? If so, can aggregate reporting and data extraction be accomplished across all instances?
3. Does your solution provide system-wide and/or campus specific role-based security to view/create/update information which can be dynamically created and modified? If so, please explain.
4. Can students have one ID but be associated with multiple campuses, and multiple careers?
5. Do you have other multi-institution customers and if so, how did they choose to implement your product?

**Evaluation Question(s) – Technical Interface Data Exchange Requirements**

The following provides the interface data exchange requirements for the Respondent’s solution.

1. Transfer of data will ONLY be accomplished using secure methods such as, but not limited to HTTPS, SCP, SFTP. Proposers must provide secure file transfer solutions and may recommend alternative processes if they would be beneficial to the UMS. Any alternatives must be described in detail and are subject to the UMS's approval. For all proposed methods of transmission, the Proposers must provide the technical requirements for establishing each method and processing transactions, a detailed description of security and authorization processes and requirements, including forms, delegation options, encryption or authentication requirements, and devices or digital certificates, alternatives available if a standard transmission method should fail, and disclose any software limitations on file sizes or numbers of records in a batch.
2. UMS prefers that whenever possible data is encrypted via PGP/GPG at rest and only decrypted when needed during processing.
3. All responses to the requirements should reflect delivered, or out-of-the-box, functionality. Respondents MUST indicate if system modification, additional products or Respondent's, costs or if any other accommodation would be necessary to meet a requirement.



**Evaluation Question(s) – Technical Interface Data Exchange Requirements**

1. Please indicate your acceptance and compliance with the high-level Interface Data Exchange Requirements outlined above, including your understanding that the Interface Data Exchange may require additional requirements definition and that your proposed solution considers this task and the resulting work in-scope. Indicate any areas of noncompliance or other concerns with these requirements.
2. Detail what security protections for the Interface Data Exchange are afforded by the solution proposed?
3. Does your solution support needs for sharing and linking data with other applications and databases?
4. If the proposed solution offers an online payment option, it is strongly preferred that it interfaces seamlessly with the University’s payment card processor “TouchNet Payment Gateway” or “TouchNet Bill Plus Pay”.
  - a. Is the proposed solution an existing TouchNet Ready Partner?
  - b. If not an existing TouchNet Ready Partner:
    - i. Are you willing to integrate with the TouchNet platform at your expense? A time frame for accomplishing this integration must be provided.
    - ii. If you are proposing a different solution:
      1. Does the solution currently have an existing website for accepting payments? If so, please provide that URL and assurances that it is PCI-DSS compliant.
      2. Does this solution use a third party application for accepting payments? If so, who is the third party service provider of the application, and provide assurance that the application is PA-DSS compliant.
      3. Does the payment processing solution integrate with an Identity Management System? If so, describe how.
5. Is there an existing interface with each of the following, or would a custom interface need to be developed? For each, please explain.
  - a. Oracle PeopleSoft
  - b. CollegeNet/25Live, UMS current room scheduling solution
  - c. Caterease, UMS current catering solution
  - d. AssetWorks AiM, UMS current facilities management solution for work orders
6. Does your solution allow easy integration with other applications including desktop tools, for example, Microsoft Office Professional Suite (Word, Excel, PowerPoint, Access Dataset)?
7. Does your system provide for auto/mass load of new and/or updated records to obtain data from external sources? Users MUST be able to perform the load, preview it online, and set additional rules before committing it to the database. It is preferable that a wizard or other user aid be available for this purpose. Some "uploads" may be updating existing records.