



Administered by University of Maine System
Office of Strategic Procurement
Request for Bid (RFB)

Data Dictionary/Data Glossary Solution

RFB #2023-003

BID SUBMISSION PACKAGE

RFB #2023-003

Issued Date: June 29, 2022

Response Deadline Date/Time: July 13, 2022, 11:59 p.m. EST

Response Submission Information:

Submitted electronically to UMSResponses@maine.edu
Email Subject Line – RC: DD/DG - RFB#2023-003

Response Contact Information:

Strategic Sourcing Manager (SSM): Robin Cyr
Email: robin.cyr@maine.edu

Appendix B – University of Maine System Response Cover Page

RFB # 2023-033 Data Dictionary/Data Glossary 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:	

IMPORTANT - Respondent is required to place an 'X' to indicate which solutions are offered as a solution in this response:

_____ **Data Dictionary/Data Glossary**

_____ **Metadata & Source Data Structure**

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 agreement 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 Agreement, 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 C – Debarment, Performance and Non-Collusion Certification

University of Maine System
DEBARMENT, PERFORMANCE and NON-COLLUSION
CERTIFICATION
RFB # 2023-033
Data Dictionary/Data Glossary 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 Agreements issued by any governmental agency.
- b. Have not within three years of submitting the proposal for this Agreement 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 Agreement.
 - 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

RFB # 2023-033
Data Dictionary/Data Glossary 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 D 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 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 investments, the Respondent must provide which investments the University needs to maintain. For solution responses that do not leverage the University’s investments, the Respondent must provide what additional investments would be needed to support the solution.

Provide rate schedule for the high-level deliverables defined RFB Section 1.1.2.

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

University Name – Institution name pertaining to the costs related to the solution (if applicable).

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.

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. If your solution supports both Data Dictionary and Data Glossary please provide your cost in the third table provided.

Data Dictionary/Data Glossary

#	Item Description	Initial One-Time Cost Training	Initial One-Time Cost Implementation	Year 1 Cost	Year 2 Cost	Year 3 Cost	Year 4 Cost	Year 5 Cost
	Subtotal							
	Less Discount							
	Total							

Metadata & Source Data Structure

#	Item Description	Initial One-Time Cost Training	Initial One-Time Cost Implementation	Year 1 Cost	Year 2 Cost	Year 3 Cost	Year 4 Cost	Year 5 Cost
	Subtotal							
	Less Discount							
	Total							

Data Dictionary/Data Glossary Solutions and Metadata & Source Data Structure

#	Item Description	Initial One-Time Cost Training	Initial One-Time Cost Implementation	Year 1 Cost	Year 2 Cost	Year 3 Cost	Year 4 Cost	Year 5 Cost

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

Provide rate schedule for the high-level deliverables defined RFB Section 1.1.2.

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. As appropriate please indicate if the professional services relate to the Data Dictionary, Data Glossary or Both solution(s).

Deliverable	Role / Position Title (Table 2)	Hours	Hourly Rate	Extended Cost
Professional Services engagement, only if required for successful implementation of the solution with all features specified in the document.				

Appendix D – Solution 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 H1 contact the Proposal Contact identified on the cover page of this document.

#	Category	Description	Importance (Required, Preferred)	Respondent Response (enter one) Yes / Partial / No	Respondent's Comments
1	Data Dictionary-- Configuration	Fields for recording Functional Definition as well as Technical Definitions	Required		
2	Data Dictionary-- Configuration	Ability to customize workflows for different use cases/different user groups	Strongly Preferred		
3	Data Dictionary-- Configuration	Fields for recording an element's data steward	Strongly Preferred		
4	Data Dictionary-- Configuration	Fields for indicating data access requests for data element	Strongly Preferred		
5	Data Dictionary--Definition Development	Workflows for collaborative definition development, commenting, and approval	Required		
6	Data Dictionary--Definition Development	Capabilities for version control	Required		
7	Data Dictionary--Definition Development	Ability to categorize definitions into functional areas	Required		
8	Data Dictionary--Definition Development	Ability to format definitions, add links & attachments	Required		
9	Data Dictionary--Definition Development	Ability to tag definitions to connect them to related definitions	Required		
10	Data Dictionary--Definition Development	Ability to designate classification level for each data element	Required		
11	Data Dictionary--Definition Development	Ability for attachments to automatically stay with a definition (across versions)	Strongly Preferred		
12	Data Dictionary--Definition Development	Ability to embed images in all text boxes	Strongly preferred		
13	Data Dictionary--Dictionary Management	Ability to Export definitions (CSV or XLS)	Required		
14	Data Dictionary--Dictionary Management	Ability to review definitions at various stages of development	Required		
15	Data Dictionary-- Integrations	Ability for external systems to access data definitions.	Strongly Preferred		
16	Data Dictionary--User Access	Single Sign-On accessibility for all UMS community members	Required		
17	Data Dictionary--User Access	Ability to set up notifications for new definitions, needed input, and configure notification preferences	Required		
18	Data Dictionary--User Access	Ability to link to specific data elements within the dictionary	Required		
19	Data Dictionary--User Access	Ability to add collaborators from entire user community	Required		
20	Data Dictionary--User Access	Ability to batch email users, collaborators, or commenters	Strongly Preferred		
21	Data Dictionary--User Interface	Mobile-friendly / responsive design	Nice to have		
22	Data Dictionary--User Interface	Web accessible	Required		
23	Technical Integration-- Automation	Ability to automate inventory collection and updates of that inventory directly from a data source	Strongly preferred		
24	Technical Integration--Data Quality	Ability to check data quality directly in a data source and trigger events based on violations	Nice to have		
25	Technical Integration-- Inventory	Ability to inventory and organize data assets	Required		
26	Technical Integration-- Inventory	Ability to document data sources and technical metadata	Required		
27	Technical Integration-- Inventory	Ability to link data definitions to underlying data objects within DBMS schemas	Strongly preferred		