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

SUBMISSION FORM PACKAGE

Event and Room Booking Solution

RFP 2026-036

Issued Date: January 22, 2026

Response Deadline Date/Time: February 24, 2026, 11:59 p.m. ET

Response Submission Information:
Submitted electronically to UMSResponses@maine.edu
Email Subject Line – DL: Event and Room Booking Solution - RFP#2026-036

Response Contact Information:

Email: UMSResponses@maine.edu

INSTRUCTIONS

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.

1.1.1 Section 1 - Response Cover Page

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

1.1.2 Section 2 - Cost Response

1.1.2.1 Label this response - Section 2 – Cost Evaluation
1.1.2.2 Insert Appendix C – Required Cost Evaluation Exhibits

1.1.3 Section 3 - Master Agreement

1.1.3.1 Label this response - Section 3 – Master Agreement
1.1.3.2 Insert Appendix D1 – Master Agreement

1.1.4 Section 4 - Response to Questions

1.1.4.1 Label this response - Section 4 – Response to Evaluation Questions & Related Information
1.1.4.2 Insert Appendix E – Organization Reference Form
1.1.4.3 Insert Appendix F – Evaluation Question(s) - Organization, Qualifications and Experience
1.1.4.4 Insert Appendix G – Evaluation Question(s) –Implementation, Training, Support and Reporting
1.1.4.5 Insert Appendix H – Solution Requirements Matrix
1.1.4.6 Insert Appendix I – Evaluation – Compliance Requirements (Accessibility & Information Security)

- HECVAT
- Information Security Questions
- Voluntary Product Accessibility Template (VPAT)
- Detailed Description of Accessibility features.

1.1.4.7 Insert Appendix J – Evaluation Question(s) – Information Technology

SECTION 1

Appendix A – University of Maine System Response Cover Page

RFP # 2026-036
Event and Room Booking 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 # 2026-036
Event and Room Booking 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

SECTION 2

Appendix C – Required Cost Evaluation Exhibits

University of Maine System
COST EVALUATION

RFP # 2026-036
Event and Room Booking 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 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.

IMPORTANT: The University requires pricing for Faculty Activity Tracking functionality in Exhibit 1, Table 1. All additional functionalities including supporting the ability to populate web profiles with faculty data stored in the solution and other modules the Respondent may have for future consideration by the University, should reflect pricing in Exhibit 1, Table 4.

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.

Prorated Licensing: Provide the initial prorated licensing for the period noted in the column header. This is required to allow the University to pay future licensing and maintenance at the start of the fiscal year July 1st.

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 – 10) - 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 which includes the prorated licensing and one-time costs.

Subtotal – Subtotal of the Extended Cost figures.

Less Discount – Discount offered off the Subtotal figure.

Total – Subtotal less Discount.

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.

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

Provide rate schedule for the high-level deliverables defined RFP Section 1.1.4 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.

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. These may vary by Respondent response. There is no penalty for not completing this section.

IMPORTANT: The University requires pricing for Faculty Activity Tracking functionality in Exhibit 1, Table 1. All additional functionalities including supporting the ability to populate web profiles with faculty data stored in the solution and other modules the Respondent may have for future consideration by the University, should reflect pricing in Exhibit 1, Table 4.

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.

Prorated Licensing: Provide the initial prorated licensing for the period noted in the column header. This is required to allow the University to pay future licensing and maintenance at the start of the fiscal year July 1st.

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 – 10) - 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 which includes the prorated licensing and one-time costs.

Subtotal – Subtotal of the cost figures for each year.

Less Discount – Discount offered off the Subtotal figure.

Total – Subtotal less Discount.

SECTION 3

Appendix D1 – Evaluation Question(s) – Master Agreement

This portion of the RFP contains special terms and conditions which will govern the resulting agreement, many of which are stated in RFP Section 1.2, with more detail in RFP Appendix D. Please indicate your acceptance for each special term by "X' in the Agree or Disagree column.

Should you take exception to any of these special terms and conditions you are required to note your exception directly below each of the respective terms in question. It should be noted that any exceptions may result in the disqualification of your proposal, lack of providing the required response or indicating terms will be negotiated post award will result in a zero (0) score for the Master Agreement evaluation criteria in RFP Section 2.1.1.

#	Language Reference	Agreement Language / Requirement	Agree	Disagree
Section 2 Requirement: Term				
	Term	This Agreement shall commence on ______________________ and shall terminate on __________________, unless terminated earlier as provided in this Contract with option for additional renewals upon the parities' mutual written agreement.		
Respondent Exception:				

#	Language Reference	Agreement Language / Requirement	Agree	Disagree
Section 4 Requirement: Termination				
	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 affected by delivery to the Agreement or 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 Agreement or shall not be reimbursed for any costs incurred after the effective date of termination.		
Respondent Exception:				

#	Language Reference	Agreement Language / Requirement	Agree	Disagree
Section 5 Requirement: Obligations Upon Termination				
	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 Agreement or for all services performed to the effective date of termination subject to offset of sums owed by the Agreement or to the University.		
Respondent Exception:				

#	Language Reference (RFP Section 3.0)	Agreement Language / Requirement	Agree	Disagree
Section 6 Requirement: Agree to termination language that excludes option for termination for reasons of non-appropriation.				
	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.		
Respondent Exception:				

#	Language Reference	Agreement Language / Requirement	Agree	Disagree
Section 8 Requirement: Modification				
	Modification	This Agreement may be modified or amended only in a writing signed by both parties.		
Respondent Exception:				

#	Language Reference	Agreement Language / Requirement	Agree	Disagree
Section 10 Requirement: Applicable Law				
	Applicable Law	This Agreement shall be governed and interpreted according to the laws of the State of Maine		
Respondent Exception:				

#	Language Reference	Agreement Language / Requirement	Agree	Disagree
Section 13 Requirement: Indemnification				
	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. This Agreement shall be governed and interpreted according to the laws of the State of Maine. This includes Maine Tort Claims Act (14 M.R.S.A. '8101, et seq.).		
Respondent Exception:				

#	Language Reference	Agreement Language / Requirement	Agree	Disagree
Section 17 Requirement: Entire Agreement				
	Entire Agreement	This Agreement 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 Agreement 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 Agreement. Contractor may not unilaterally change any term or condition of this Agreement.		
Respondent Exception:				

#	Language Reference	Agreement Language / Requirement	Agree	Disagree
Section 21 Requirement: Confidentiality				
	Confidentiality	The Agreement or shall comply with all laws and regulations relating to confidentiality and privacy including but not limited to any rules or regulations of the University. The University must adhere to the provisions of the Maine Freedom of Access Act (FOAA), 1 MRSA §401 et seq. As a condition of agreement, a respondent must accept that, to the extent required by the Maine FOAA, any ensuing contractual documents, are considered public records and therefore are subject to freedom of access requests.		
Respondent Exception:				

#	Language Reference	Agreement Language / Requirement	Agree	Disagree
Requirement: Rider B Insurance Requirements				
Respondent Exception:				

SECTION 4

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	

1. Please indicate if your company either self identifies or holds certification as a LGBTQ+ BE, MBE, SDVBE, SBE, veteran-owned, service-disabled veteran-owned, HUBZone, small disadvantaged business, women-owned, minority-owned, WBE, VBE etc. If appropriate, please indicate if you hold a certification. If certified, prior to an award the University may request a copy of the certification from your company.

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. Company Overview:
    a. 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?

    b. 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.

    c. Please provide information about contract cancellations or non-renewals your company has experienced over the last three years.

2. 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 and deployments comparable to our scope (single facility with both internal and external stakeholders).

3. 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 for our use case?

4. 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.

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

G1. Implementation Approach

Describe your implementation strategy for approximately 40–50 rooms/spaces and about 150 users. In your response, include:

- **Project structure and roles.** Explain vendor and client responsibilities, identify primary contacts, and outline governance and decision-making.
- **Timeline and milestones.** Provide typical phases from kickoff to go-live (configuration, data setup, user acceptance testing (UAT), and cutover). Note if a fast-track option is available.
- **Configuration objectives.** Describe how you will configure role-based and room-based policies (for example, faculty/staff auto-book; students/external request-only; exceptions/blackouts) and automated service workflows (technology/audio-visual requests routed to Information Technology and Facilities with work queues and scheduled reports).
- **Data load and readiness.** Specify what you will import and configure (for example, rooms, layouts, resources/equipment, price lists, forms) and list any prerequisites.
- **Calendars and panels (confirmation only).** Explain, at a high level, how you will enable visibility on Google Workspace calendars and support room-adjacent tablet displays or kiosks. (Detailed capabilities are addressed in Appendix H4.)

Optional: You may include one screenshot of the administrator configuration screen that controls role- and room-based policies.

G2. Adoption and Change Management

Provide your change-management plan from discovery to post-go-live: process discovery, configuration approach, end-user communications, pilot, cutover, focused post-go-live “hypercare” support (enhanced support immediately after launch), and the plan for iterative improvements after the initial rollout.

G3. Training

Describe your training plan and options. In your response, include:

- **Audiences, formats, and duration.** Describe training for administrators and event operations staff, internal bookers (faculty and staff), and external requestors/clients. Indicate delivery formats (on-site, live virtual, self-service) and provide typical duration per audience (sessions × minutes/hours) and recommended class size.
- **Enablement materials.** List materials provided (for example, quick-start guides and short micro-videos) for common tasks such as requesting a space, modifying a booking, adding services, creating an invoice, and running a utilization report.
- **Ongoing training.** Explain how you provide refresher and new-feature training after go-live.

G4. Support and Service Levels

Summarize your support model and quality commitments. In your response, include:

- **Support hours and channels,** and access to your knowledge base or documentation portal.

- **Incident handling and service-level agreements (SLAs),** including triage, escalation, and any remedies.
- **Account management,** including post-go-live roles such as a Customer Success Manager and the typical cadence of check-ins or business reviews.
- **Release and change notifications** for product updates that may affect training or student-facing workflows.
- **Configuration change turnaround** for items such as workflow rules, intake forms, pricing tables, and service catalog updates.

G5. Reporting (Overview)

Describe your reporting capabilities and delivery options. In your response, include:

- **Delivered and ad-hoc reporting.** Summarize the standard reports and dashboards that are included and explain your ad-hoc or custom reporting options.
- **Distribution, filtering, and export.** Indicate whether reports can be scheduled and emailed to distribution lists, filtered by date/room/user, and exported in common formats (for example, CSV, Excel, or JSON).
- **Security and space utilization.** Describe how reporting supports building security (for example, visitor check-in/out logs, after-hours bookings, no-show or uncleared rooms, access or door activity if integrated, incident summaries, and audit trails) and helps optimize space use (for example, utilization rates by room and time, peak versus off-peak patterns, occupancy versus capacity, repeat versus first-time user trends, and underused rooms).
- **Operational run sheets.** Explain how the system produces operational run sheets for teams such as Information Technology and Facilities (for example, weekly lists of upcoming audio/visual setups with event name, time window, room, requested services, and notes) and how task status or completion is reflected.

Optional: If available, include one sample dashboard screenshot and one sample report (PDF or image) that illustrate your utilization or security reporting.

Appendix H – Evaluation Question(s) – Solution Requirements Narrative Questions

Respondent's Organization Name: ____

*For each item, indicate **Standard**, **Configuration**, or **Requires Additional Product/Services**. If not applicable, note **N/A**. Keep narratives concise and include examples or screenshots where helpful.*

H1. Functional Requirements

1. **User types & access**
   Describe how the solution supports faculty, staff, students, and external clients with distinct user experiences and policy treatment.

2. **Role- and room-based policies**
   Explain how booking rules can be applied by role (for example, faculty/staff auto-book) and by room/space (for example, request/approval only for specific rooms), including handling of exceptions, blackout windows, and conflict prevention.

3. **Booking channels: internal self-service and public requests/booking**
   Describe how internal users submit and manage self-service bookings and how external users request or book spaces (where policy allows), including intake forms, eligibility checks, and status communications.

4. **Approvals & automation**
   Describe configurable approval chains, notifications, reminders, and escalations for internal and external requests.

   Service workflows to operations teams: When bookings include technology, A/V, setups, or other services, explain how tasks/notifications are created and routed to the appropriate team (for example, IT or Facilities) and how these appear in team work queues and operational lists.

5. **Events, services & resource management**
   Show how users add event notes, select services/resources (for example, A/V, layouts, catering), and how the system prevents conflicts on limited-quantity resources.

6. **Recurring reservations**
   Describe support for recurring and semester-based bookings with conflict prevention.

7. **Calendars & visibility (including confirmations)**
   Explain real-time availability (web/mobile) and how bookings appear on user calendars. Confirm whether booking confirmations include calendar invitations (iCalendar/ICS) and/or "Add to Calendar" links for users who do not have direct sync.

8. **Room-adjacent tablets/kiosks (behavior)**
   Describe status display (free/busy), check-in/no-show handling, and whether walk-up booking or request is supported at the device.

9. **Client-facing dashboard**
   Describe any interactive dashboard/portal that internal or external users can access to view availability, submit and track requests, update details, and access documents/invoices.

10. **Billing & invoicing for external events**
    Explain how estimates/quotes, deposits, final invoices, adjustments/credits, and audit trails are handled for external events and partners.

11. **Light client/organization management (CRM-light)**
    Describe how client/organization profiles, history, and documents (for example, quotes and contracts) are stored and surfaced during booking.

12. **Reporting & dashboards (insights)**
    Describe the key metrics and insights available for space utilization (for example, peak/off-peak, occupancy vs. capacity, underused rooms), approvals/throughput, security/visitor views, revenue, and usage by user type. Provide representative examples or screenshots.

H2. Usability

13. **Ease of use, mobile experience, and customization**
    Summarize the UX approach, mobile experience, and branding/configuration options (for example, forms, fields, terminology). Include how views can be simplified for students and external users to minimize friction.

Appendix H1 – 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.

Appendix I – Evaluation – Compliance Requirements (Accessibility & Information Security) Requirements (Updated 03/17/2022)

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 and that protect University data.

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) – Information Security and Accessibility Standards Compliance

1. The University requires all respondents to complete the Educause-created Higher Education Community Vendor Assessment Tool (HECVAT) if any of the following are true:
    a. Your solution is cloud-based, Software as a Service (SaaS) or hosted on any system that is not operated by the University of Maine System

    b. Your solution involves any sensitive data transmitted, stored, processed, or accessed by the bidder or a contractor of the bidder (including consultants)

    c. The solution includes any human interface(s), such as an end-user device software component, web site or page, video or audio playback, file upload, mobile device apps, etc., or produces, includes or relies on electronic materials such as documents, PDFs, email, etc.

2. The HECVAT can be found at the Educause website.

3. When completing the HECVAT, the HECVAT Full must be completed (and not the HECVAT Lite) when any of the following conditions apply:

    a. The solution includes providing consulting services.

    b. The data transmitted, stored, processed or accessed includes protected health information (PHI) or any data covered by the Health Insurance Portability and Accountability Act (HIPAA),

    c. The solution involves processing credit or debit card payment transactions.

4. The HECVAT submitted must be a HECVAT version 3.0 or higher even if you have previously completed an earlier version.

5. The completed HECVAT must be submitted electronically in the original Excel file format.

6. Please describe the solution's breach notification process, data retention/destruction policy, and SSO/MFA capabilities.

7. To ensure equal opportunity for persons with disabilities, if the solution includes an end-user device software component, web site or page, video or audio playback, file upload, mobile device apps, etc., or produces, includes or relies on electronic materials such as documents, PDFs, email, etc., then provide a full completed Accessibility Conformance Report based on the Voluntary Product Accessibility Template, available at www.itic.org, version 2.4 or newer (either "VPAT 2.4 REV WCAG"

or “VPAT 2.4 REV 508”). All VPAT sections, except “Instructions” must be present and completed, such as date of assessment, contact name, methods used, etc. The completed VPAT must be machine readable, e.g., scanned copies, or a link to an online VPAT, are not acceptable.

8. If the solution involves processing credit or debit card payment transactions, provide your latest attestation of compliance (AoC) or Report on Compliance (RoC), and answer these questions:

    a. Do you intend to use your merchant account, or a University merchant account?

    b. Does your proposed solution provide for e-commerce and if so, is a shopping cart functionality hosted on a University website, your website, or a third party website?

    c. Does your proposed solution provide for card-present or card-not-present transactions and if so describe the methods and include a statement as to whether you include options that support P2PE-HW?

9. Include a statement that notes your acceptance to the conditions stated in **University of Maine System, Master Agreement, Rider C. Standards for Safeguarding Information,** as part of the agreement.

The University relies on the digital accessibility standards contained in WCAG 2.1 Level AA and Section 508 of the US Federal Rehabilitation Act.

Appendix J – Evaluation Question(s) - Information Technology (Updated 8/14/2018)

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 Service (SaaS) offering
    a. 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. 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 support modern SSO standards (SAML 2.0, OpenID Connect) and enforce MFA for admin or privileged users.
    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) – Technology Implementation Questions

1. What release/version are you proposing for the University of Maine System and when is the next release/version due out?

2. Explain how patches or updates released during implementation would be handled. Describe the change management process.

3. Please provide a roadmap of your hardware/software solutions that reflects their present states as well as future states for at least the next 18 months.

Evaluation Question(s) - Multi-Institution Capabilities

The University of Maine System consists of seven unique institutions throughout the state. 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. Do you have other multi-institution customers and if so, how did they choose to implement your product?

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

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. Although not a requirement of this proposed solution, is there an existing interface with PeopleSoft, or would a custom interface need to be developed?

6. Does your system provide for auto/mass load of new records (including ID records), matching on IDs where necessary (non-ID 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.