



REQUEST FOR PROPOSALS #2018-101

FOR

BUILDING INFORMATION AND ASSET MANAGEMENT SYSTEM

BOARD OF COUNTY COMMISSIONERS

JIM BERNARD, Chair

SONYA FISCHER, Commissioner

KEN HUMBERSTON, Commissioner

PAUL SAVAS, Commissioner

MARTHA SCHRADER, Commissioner

**Donald Krupp
County Administrator**

**George Marlton
Procurement Division Director**

**Peter Madaus
Analyst**

PROPOSAL CLOSING DATE, TIME AND LOCATION

DATE: December 13, 2018

TIME: 2:00 PM, Pacific Time

**PLACE: Clackamas County Procurement Division
Clackamas County Public Services Building
2051 Kaen Road, Oregon City, OR 97045**

SCHEDULE

Request for Proposals Issued.....	November 8, 2018
Protest of Specifications Deadline.....	November 15, 2018, 5:00 PM, Pacific Time
Deadline to Submit Clarifying Questions.....	November 26, 2018, 5:00 PM, Pacific Time
Request for Proposals Closing Date and Time.....	December 13, 2018, 2:00 PM, Pacific Time
Deadline to Submit Protest of Award.....	Seven (7) days from the Intent to Award
Anticipated Contract Start Date.....	January/February 2019

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SECTION 1
NOTICE OF REQUEST FOR PROPOSALS

Notice is hereby given that Clackamas County through its Board of County Commissioners will receive sealed Proposals per specifications until **2:00 PM, December 13, 2018** (“Closing”), to provide Building Information and Asset Management System. No Proposals will be received or considered after that time.

Proposal packets are available from 7:00 AM to 6:00 PM Monday through Thursday at Clackamas County Procurement Division, Clackamas County Public Services Building, 2051 Kaen Road, Oregon City, OR 97045, telephone (503) 742-5444 or may be obtained at <http://www.clackamas.us/bids/>. Sealed Proposals may be emailed to procurement@clackamas.us or sent to Clackamas County Attention George Marlton, Director at the above Kaen Road address.

Contact Information

Procurement Process and Technical Questions: Peter Madaus, 503-742-5451, pmadaus@clackamas.us

The Board of County Commissioners reserves the right to reject any and all Proposals not in compliance with all prescribed public bidding procedures and requirements, and may reject for good cause any and all Proposals upon the finding that it is in the public interest to do so and to waive any and all informalities in the public interest. In the award of the contract, the Board of County Commissioners will consider the element of time, will accept the Proposal or Proposals which in their estimation will best serve the interests of Clackamas County and will reserve the right to award the contract to the contractor whose Proposal shall be best for the public good.

Clackamas County encourages bids from Minority, Women, and Emerging Small Businesses.

SECTION 2 INSTRUCTIONS TO PROPOSERS

Clackamas County (“County”) reserves the right to reject any and all Proposals received as a result of this RFP. County Local Contract Review Board Rules (“LCRB”) govern the procurement process for the County.

2.1 Modification or Withdrawal of Proposal: Any Proposal may be modified or withdrawn at any time prior to the Closing deadline, provided that a written request is received by the County Procurement Division Director, prior to the Closing. The withdrawal of a Proposal will not prejudice the right of a Proposer to submit a new Proposal.

2.2 Requests for Clarification and Requests for Change: Proposers may submit questions regarding the specifications of the RFP. Questions must be received in writing on or before 5:00 p.m. (Pacific Time), on the date indicated in the Schedule, at the Procurement Division address as listed in Section 1 of this RFP. Requests for changes must include the reason for the change and any proposed changes to the requirements. The purpose of this requirement is to permit County to correct, prior to the opening of Proposals, RFP terms or technical requirements that may be unlawful, improvident or which unjustifiably restrict competition. County will consider all requested changes and, if appropriate, amend the RFP. County will provide reasonable notice of its decision to all Proposers that have provided an address to the Procurement Division for this procurement. No oral or written instructions or information concerning this RFP from County managers, employees or agents to prospective Proposers shall bind County unless included in an Addendum to the RFP.

2.3 Protests of the RFP/Specifications: Protests must be in accordance with LCRB C-047-0730. Protests of Specifications must be received in writing on or before 5:00 p.m. (Pacific Time), on the date indicated in the Schedule, or within three (3) business days of issuance of any addendum, at the Procurement Division address listed in Section 1 of this RFP. Protests may not be faxed. Protests of the RFP specifications must include the reason for the protest and any proposed changes to the requirements.

2.4 Addenda: If any part of this RFP is changed, an addendum will be provided to Proposers that have provided an address to the Procurement Division for this procurement. It shall be Proposers responsibility to regularly check the Bids and Contract Information page at <http://www.clackamas.us/bids/> for any published Addenda or response to clarifying questions.

2.5 Submission of Proposals: Proposals must be submitted in accordance with Section 5.

All Proposals shall be legibly written in ink or typed and comply in all regards with the requirements of this RFP. Proposals that include orders or qualifications may be rejected as irregular. All Proposals must include a signature that affirms the Proposer’s intent to be bound by the Proposal (may be on cover letter, on the Proposal, or the Proposal Certification Form) shall be signed. If a Proposal is submitted by a firm or partnership, the name and address of the firm or partnership shall be shown, together with the names and addresses of the members. If the Proposal is submitted by a corporation, it shall be signed in the name of such corporation by an official who is authorized to bind the contractor. The Proposals will be considered by the County to be submitted in confidence and are not subject to public disclosure until the notice of intent to award has been issued.

No late Proposals will be accepted. Proposals submitted after the Closing will be considered late and will be returned unopened. Proposals may not be submitted by telephone or fax.

2.6 Post-Selection Review and Protest of Award: County will name the apparent successful Proposer in a “Notice of Intent to Award” letter. Identification of the apparent successful Proposer is procedural only and creates no right of the named Proposer to award of the contract. Competing Proposers will be notified in writing of the selection of the apparent successful Proposer(s) and shall be given seven (7) calendar days from the date on the “Notice of Intent to Award” letter to review the file at the Procurement Division office and file a written

protest of award, pursuant to LCRB C-047-0740. Any award protest must be in writing and must be delivered by hand-delivery or mail to the address for the Procurement Division as listed in Section 1 of this RFP.

Only actual Proposers may protest if they believe they have been adversely affected because the Proposer would be eligible to be awarded the contract in the event the protest is successful. The basis of the written protest must be in accordance with ORS 279B.410 and shall specify the grounds upon which the protest is based. In order to be an adversely affected Proposer with a right to submit a written protest, a Proposer must be next in line for award, i.e. the protester must claim that all higher rated Proposers are ineligible for award because they are non-responsive or non-responsible.

County will consider any protests received and:

- a. reject all protests and proceed with final evaluation of, and any allowed contract language negotiation with, the apparent successful Proposer and, pending the satisfactory outcome of this final evaluation and negotiation, enter into a contract with the named Proposer; OR
- b. sustain a meritorious protest(s) and reject the apparent successful Proposer as nonresponsive, if such Proposer is unable to demonstrate that its Proposal complied with all material requirements of the solicitation and Oregon public procurement law; thereafter, County may name a new apparent successful Proposer; OR
- c. reject all Proposals and cancel the procurement.

2.7 Acceptance of Contractual Requirements: Failure of the selected Proposer to execute a contract and deliver required insurance certificates within ten (10) calendar days after notification of an award may result in cancellation of the award. This time period may be extended at the option of County.

2.8 Public Records: Proposals are deemed confidential until the “Notice of Intent to Award” letter is issued. This RFP and one copy of each original Proposal received in response to it, together with copies of all documents pertaining to the award of a contract, will be kept and made a part of a file or record which will be open to public inspection. If a Proposal contains any information that is considered a **TRADE SECRET** under ORS 192.345(2), **SUCH INFORMATION MUST BE LISTED ON A SEPARATE SHEET CAPABLE OF SEPARATION FROM THE REMAINING PROPOSAL AND MUST BE CLEARLY MARKED WITH THE FOLLOWING LEGEND:**

“This information constitutes a trade secret under ORS 192.345(2), and shall not be disclosed except in accordance with the Oregon Public Records Law, ORS Chapter 192.”

The Oregon Public Records Law exempts from disclosure only bona fide trade secrets, and the exemption from disclosure applies only “unless the public interest requires disclosure in the particular instance” (ORS 192.345). Therefore, non-disclosure of documents, or any portion of a document submitted as part of a Proposal, may depend upon official or judicial determinations made pursuant to the Public Records Law.

2.9 Investigation of References: County reserves the right to investigate all references in addition to those supplied references and investigate past performance of any Proposer with respect to its successful performance of similar services, its compliance with specifications and contractual obligations, its completion or delivery of a project on schedule, its lawful payment of subcontractors and workers, and any other factor relevant to this RFP. County may postpone the award or the execution of the contract after the announcement of the apparent successful Proposer in order to complete its investigation.

2.10 RFP Proposal Preparation Costs and Other Costs: Proposer costs of developing the Proposal, cost of attendance at an interview (if requested by County), or any other costs are entirely the responsibility of the Proposer, and will not be reimbursed in any manner by County.

2.11 Clarification and Clarity: County reserves the right to seek clarification of each Proposal, or to make an award without further discussion of Proposals received. Therefore, it is important that each Proposal be submitted initially in the most complete, clear, and favorable manner possible.

2.12 Right to Reject Proposals: County reserves the right to reject any or all Proposals or to withdraw any item from the award, if such rejection or withdrawal would be in the public interest, as determined by County.

2.13 Cancellation: County reserves the right to cancel or postpone this RFP at any time or to award no contract.

2.14 Proposal Terms: All Proposals, including any price quotations, will be valid and firm through a period of one hundred and eighty (180) calendar days following the Closing date. County may require an extension of this firm offer period. Proposers will be required to agree to the longer time frame in order to be further considered in the procurement process.

2.15 Oral Presentations: At County's sole option, Proposers may be required to give an oral presentation of their Proposals to County, a process which would provide an opportunity for the Proposer to clarify or elaborate on the Proposal but will in no material way change Proposer's original Proposal. If the evaluating committee requests presentations, the Procurement Division will schedule the time and location for said presentation. Any costs of participating in such presentations will be borne solely by Proposer and will not be reimbursed by County. **Note:** Oral presentations are at the discretion of the evaluating committee and may not be conducted; therefore, **written Proposals should be complete.**

2.16 Usage: It is the intention of County to utilize the services of the successful Proposer(s) to provide services as outlined in the below Scope of Work.

2.17 Review for Responsiveness: Upon receipt of all Proposals, the Procurement Division or designee will determine the responsiveness of all Proposals before submitting them to the evaluation committee. If a Proposal is incomplete or non-responsive in significant part or in whole, it will be rejected and will not be submitted to the evaluation committee. County reserves the right to determine if an inadvertent error is solely clerical or is a minor informality which may be waived, and then to determine if an error is grounds for disqualifying a Proposal. The Proposer's contact person identified on the Proposal will be notified, identifying the reason(s) the Proposal is non-responsive. One copy of the Proposal will be archived and all others discarded.

2.18 RFP Incorporated into Contract: This RFP will become part of the Contract between County and the selected contractor(s). The contractor(s) will be bound to perform according to the terms of this RFP, their Proposal(s), and the terms of the Sample Contract.

2.19 Communication Blackout Period: Except as called for in this RFP, Proposers may not communicate with members of the Evaluation Committee or other County employees or representatives about the RFP during the procurement process until the apparent successful Proposer is selected, and all protests, if any, have been resolved. Communication in violation of this restriction may result in rejection of a Proposer.

2.20 Prohibition on Commissions and Subcontractors: County will contract directly with persons/entities capable of performing the requirements of this RFP. Contractors must be represented directly. Participation by brokers or commissioned agents will not be allowed during the Proposal process. Contractor shall not use subcontractors to perform the Work unless specifically pre-authorized in writing to do so by the County. Contractor represents that any employees assigned to perform the Work, and any authorized subcontractors performing the Work, are fully qualified to perform the tasks assigned to them, and shall perform the Work in a competent and professional manner. Contractor shall not be permitted to add on any fee or charge for subcontractor Work. Contractor shall provide, if requested, any documents relating to subcontractor's qualifications to perform required Work.

2.21 Ownership of Proposals: All Proposals in response to this RFP are the sole property of County, and subject to the provisions of ORS 192.410-192.505 (Public Records Act).

2.22 Clerical Errors in Awards: County reserves the right to correct inaccurate awards resulting from its clerical errors.

2.23 Rejection of Qualified Proposals: Proposals may be rejected in whole or in part if they attempt to limit or modify any of the terms, conditions, or specifications of the RFP or the Sample Contract.

2.24 Collusion: By responding, the Proposer states that the Proposal is not made in connection with any competing Proposer submitting a separate response to the RFP, and is in all aspects fair and without collusion or fraud. Proposer also certifies that no officer, agent, elected official, or employee of County has a pecuniary interest in this Proposal.

2.25 Evaluation Committee: Proposals will be evaluated by a committee consisting of representatives from County and potentially external representatives. County reserves the right to modify the Evaluation Committee make-up in its sole discretion.

2.26 Commencement of Work: The contractor shall commence no work until all insurance requirements have been met, the Protest of Awards deadline has been passed, any protest have been decided, a contract has been fully executed, and a Notice to Proceed has been issued by County.

2.27 Best and Final Offer: County may request best and final offers from those Proposers determined by County to be reasonably viable for contract award. However, County reserves the right to award a contract on the basis of initial Proposal received. Therefore, each Proposal should contain the Proposer's best terms from a price and technical standpoint. Following evaluation of the best and final offers, County may select for final contract negotiations/execution the offers that are most advantageous to County, considering cost and the evaluation criteria in this RFP.

2.28 Nondiscrimination: The successful Proposer agrees that, in performing the work called for by this RFP and in securing and supplying materials, contractor will not discriminate against any person on the basis of race, color, religious creed, political ideas, sex, age, marital status, sexual orientation, gender identity, veteran status, physical or mental handicap, national origin or ancestry, or any other class protected by applicable law.

2.29 Intergovernmental Cooperative Procurement Statement: Pursuant to ORS 279A and LCRB, other public agencies shall have the ability to purchase the awarded goods and services from the awarded contractor(s) under terms and conditions of the resultant contract. Any such purchases shall be between the contractor and the participating public agency and shall not impact the contractor's obligation to County. Any estimated purchase volumes listed herein do not include other public agencies and County makes no guarantee as to their participation. Any Proposer, by written notification included with their Proposal, may decline to extend the prices and terms of this solicitation to any and/or all other public agencies. County grants to any and all public serving governmental agencies, authorization to purchase equivalent services or products described herein at the same submitted unit bid price, but only with the consent of the contractor awarded the contract by the County.

SECTION 3 SCOPE OF WORK

3.1. INTRODUCTION

Clackamas County, on behalf of its Facilities Management Division, is seeking Proposals from vendors to provide a Building Information and Asset Management (BIAM) System for the management of real estate, buildings, assets, projects, preventative maintenance, on-demand maintenance, space planning, utilities, vital building information, and other related information.

Please direct all Technical/Specifications or Procurement Process Questions to the indicated representative referenced in the Notice of Request for Proposals and note the communication restriction outlined in Section 2.19.

3.2 BACKGROUND

Clackamas County Facilities Management is seeking a BIAM System that will be able to manage buildings and land with critical information, maintenance programs, lifecycle management, and budget / operational costing. The implementation of the system may be done in phases to insure proper setup and training. The BIAM System would include real estate and property management, building maintenance, building preventative maintenance, life cycle management, building operations, building inspections, space planning management, asset management, project management, utility management, environmental and risk management, move management, fleet management, surplus management, inventory management, capital planning, conference room management, contract management, customer request, financial management, and budget management.

The goal of the system is to improve the lifecycle of the county's asset, to perform maintenance on an asset, finance and budget creation and review, have a centralized location to acquire information regarding the assets of the County, to be able to create a variety of reports, easy for staff to use the system, a broad number of customized fields to be able to provide a wide variety of information to track specific information.

The BIAM System will be managed overall by Facilities Management with allowing users from other departments to have an unlimited number of service requesters. Facilities Management will have 60 + staff, with different level of access to the BIAM System, who will be working at a detailed and involved level of the system.

3.3. SCOPE OF WORK

The purpose of the BIAM System is to help Facilities Management efficiently manage the County's buildings and assets. At the time of this RFP, the County has 155 facilities totaling 1,309,462 square feet and an array of capital assets. This BIAM System may be done in phases to insure proper installation, setup, training, execution of the system, and within budgeted funds. This section outlines the mandatory requirements, secondary requirements, and specialty requirements.

3.3.1. MANDATORY REQUIREMENTS

- Easy to use by users with different computer abilities
- Provides a way to create customized reports from the data within the system
- Enables the management and standardization of data to ensure data integrity
- Provide role-based user security, application security, and security logging along with auditing capabilities

- Be configurable without the need for source code modification. Example – user defined fields, ability to change label names, front end screen configured for each user depending on their system defined role.
- Allow for storage of scanned documents, interfaced with Autodesk AutoCAD and Revit, Geographical Information System (GIS) interface
- Provide for expandability and flexibility to add various modules as needed
- Able to be used on mobile devices as well as computer workstations
- Building Operations and Maintenance ability
- Customer Request ability
- Life Cycle Maintenance Management
- Real Estate Portfolio Management
- Space Planning and Management
- Asset Management
- Utility Management
- Environmental and Risk Management
- Financial and Budget Management

3.3.2. SECONDARY REQUIREMENTS

- Capital Project Management abilities
- Move Management
- Contract Administration
- Inventory and Surplus Management
- Conference Room Management
- Fleet Management
- Ability to generate Billings and Invoices

3.3.3. SPECIALTY REQUIREMENTS

- Interface with WorkForce Time Clock Management
- Interface with Oracle PeopleSoft or Oracle Fusion

3.3.4. WORK SCHEDULE

Proposed work schedules shall assume an anticipated system go-live date of **July 1, 2020**.

3.3.5. TERM OF CONTRACT:

The term of the contract shall be from the effective date through **December 31, 2021** with the option for two (2) additional one (1) year renewals thereafter subject to the mutual agreement of the parties. The estimated maximum budget for the **initial term** is approximately **\$360,000.00**. The estimated annual budget for each of the **renewal terms** is approximately **\$122,500.00**. This budget is for planning and scoping purposes only, and is subject to change.

Following the initial contract term and all renewal periods, County may, at its discretion, enter into additional contracts to support the ongoing costs (e.g., subscription, support, maintenance, etc.) of the system, or other ongoing costs as deemed necessary by County for the ongoing services.

3.3.6. SAMPLE CONTRACT:

Submission of a Proposal in response to this RFP indicates Proposer’s willingness to enter into a contract containing substantially the same terms (including insurance requirements) of the sample contract identified below. No action or response to the sample contract is required under this RFP. Any objections to the sample contract terms should be raised in accordance with Paragraphs 2.2 or 2.3 of this RFP, pertaining to requests for clarification or change or protest of the RFP/specifications, and as otherwise provided for in this RFP. This RFP and all supplemental information in response to this RFP will be a binding part of the final contract.

The applicable Sample Professional Services Contract for this RFP can be found at <http://www.clackamas.us/bids/terms.html>.

Professional Services Contract (unless checked, item does not apply)

The following paragraphs of the Professional Services Contract will be applicable:

- Article I, Paragraph 4 – Travel and Other Expense is Authorized
- Article II, Paragraph 29 – Confidentiality
- Article II, Paragraph 29 – Criminal Background Check Requirements
- Article II, Paragraph 30 – Key Persons
- Exhibit A – On-Call Provision

The following insurance requirements will be applicable:

- Professional Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per occurrence, with an annual aggregate limit of \$2,000,000 for damages caused by error, omission or negligent acts.
- Commercial General Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per occurrence, with an annual aggregate limit of \$2,000,000 for Bodily Injury and Property Damage.
- Automobile Liability: combined single limit, or the equivalent, of not less than \$500,000 per occurrence for Bodily Injury and Property Damage.
- Cyber Liability (required limits to be determined during contract negotiations)

Proposers may also provide a copy of a model agreement that it would like County to consider in the event that a contract is awarded. Inclusion of Proposer’s model agreement is response to this RFP shall not constitute, either express or implied, agreement by County to using said model agreement or any of its terms in the event that a contract is awarded as a result of this RFP.

SECTION 4 EVALUATION PROCEDURE

- 4.1** An evaluation committee will review all Proposals that are initial deemed responsive and they shall rank the Proposals in accordance with the below criteria. The evaluation committee may recommend an award based solely on the written responses or may request Proposal interviews/presentations. Interviews/presentations, if deemed beneficial by the evaluation committee, will consist of the highest scoring Proposers. The invited Proposers will be notified of the time, place, and format of the interview/presentation. Based on the interview/presentation, the evaluation committee may revise their scoring.

Written Proposals must be complete and no additions, deletions, or substitutions will be permitted during the interview/presentation (if any). The evaluation committee will recommend award of a contract to the final County decision maker based on the highest scoring Proposal. The County decision maker reserves the right to accept the recommendation, award to a different Proposer, or reject all Proposals and cancel the RFP.

Proposers are not permitted to directly communicate with any member of the evaluation committee during the evaluation process. All communication will be facilitated through the Procurement representative.

4.2 Evaluation Criteria

<u>Category</u>	<u>Points available:</u>
Software Survey (Section 5.2.)	0-35
Implementation Process and Training Plan (Section 5.3.)	0-25
Support of the System (Section 5.4.)	0-15
References (Section 5.5.)	0-5
Fees (Section 5.6.)	0-20
Available points	0-100

- 4.3** Once a selection has been made, the County will enter into contract negotiations. During negotiation, the County may require any additional information it deems necessary to clarify the approach and understanding of the requested services. Any changes agreed upon during contract negotiations will become part of the final contract. The negotiations will identify a level of work and associated fee that best represents the efforts required. If the County is unable to come to terms with the highest scoring Proposer, discussions shall be terminated and negotiations will begin with the next highest scoring Proposer. If the resulting contract contemplates multiple phases and the County deems it is in its interest to not authorize any particular phase, it reserves the right to return to this solicitation and commence negotiations with the next highest ranked Proposer to complete the remaining phases.

SECTION 5 PROPOSAL CONTENTS

5.1. Vendors must observe submission instructions and be advised as follows:

5.1.1. Complete Proposals may be mailed to the below address or emailed to Procurement@clackamas.us. The subject line of the email must identify the RFP title. Proposers are encouraged to contact Procurement to confirm receipt of the Proposal. If the Proposal is mailed, an original copy and an electronic copy (on compact disk or jump drive) must be included. The Proposal (hardcopy or email) must be received by the Closing Date and time indicated in Section 1 of the RFP.

5.1.2. Mailing address including Hand Delivery, UPS and FEDEX:

Clackamas County Procurement Division – Attention George Marlton, Director
Clackamas County Public Services Building
2051 Kaen Road
Oregon City, OR 97045

5.1.3. County reserves the right to solicit additional information or Proposal clarification from the vendors, or any one vendor, should the County deem such information necessary.

Provide the following information in the order in which it appears below:

5.2. Software Survey (0-35 Points):

Review and provide responses for all the survey questions found in Attachment A. If responses to the Software Survey questions are provided separately from the table format found on Attachment A (e.g., because responses do not fit on the table), all Software survey responses must clearly reference applicable survey questions. If other benefits of the system were not part of the survey questions, those items could be included in a supplemental section called “Additional System Benefits”. Notwithstanding the aforementioned exceptions, please provide the electronic Excel document with the responses to the survey questions.

5.3. Implementation Process and Training Plan (0-25 Points):

Proposer shall outline in detail the process to implement the system, including but not limited to the following:

- The installation process
- The testing process
- Timeline/schedule for major tasks to perform
- The interface and integration process and the amount of time and resources needed to populate the data within the system
- Describe the process in detail and identify the tasks that must be completed by the County

The Proposer shall provide a list including the following information:

- All software and accessories necessary to implement the system to ensure full functionality.
- The hardware specifications to support the proposed BIAM.

The Proposer has sole responsibility for integration of, or interoperation with, all supplied components with the County supplied elements, although the County will assist in coordinating the process.

Throughout the implementation, on a module by module basis, the system’s Quality Assurance (QA) process must be documented and provided along with sample results from a typical QA run. A full system QA run is to be done as the final step prior to system implementation and must be documented as noted above. The Proposer

must detail the way the QA will be completed. The proposed system must include an online “Help File.” The Proposer shall declare if the proposed system meets this requirement.

The Proposer shall provide a timeframe for completing the integration along with the amount of oversight and project management that will be provided. The Proposer must designate a dedicated project manager and team to work with the County to insure a seamless transition to the new system.

The Proposer shall describe the training process

- Required for each of the different user security levels. The current planned levels include administrators, data entry/data management, viewing/report creation, maintenance providers/technicians, and service requesters.
- To provide the necessary team to complete all the different levels of trainings.
- The Proposer shall supply all of the training material, operations manuals, user guides, and definitions for each of the system’s data fields (working with the County).
- Shall explain what level will have on-site simulated live group training classes.
- The Proposer must specify a method to train future users.
- The Proposer shall provide a copy of the proposed training curriculum and schedule.

5.4. Support of the System (0-15 Points):

The Proposer shall explain the ability to support the BIAM System. The explanation shall include but not limited to the following:

- How issues will be communicated by both the Proposer and the County
- When support is available or not available
- The technician qualifications
- The on-site support ability
- The redundancy of the system
- How updates and patches will be provided (either hosted by the County or by a third party)
- The response time to issues
- The method and process to escalating service problems
- Provide a list of sub-companies that are involved with the system

5.5. References (0-5 Points):

Provide at least three (3) references from clients your firm has served similar to the County in the past three (3) years, including one client that has newly engaged the firm in the past thirty-six (36) months and one (1) long-term client. Provide the name, address, email, and phone number of the references. Please note the required three references may not be from County staff, but additional references may be supplied.

5.6. Fees (0-20 Points)

In preparing fee responses, please note the estimated budget figures presented in **Section 3.3.5.** of this RFP. Fees should be on a time and material with a not to exceed fee basis. Fees should be sufficiently descriptive to facilitate acceptance of a Proposal. The Proposer shall provide a detailed listing of all of the costs related to all aspects of the system. This includes but not limited to:

- Fees for equipment/hardware, materials, the basic software
- Fees for each additional module
- Hardware and/or software licensing fees
- Training fees
- The total system lifecycle cost
- Annual escalation cap for all future fees
- Configuration fees
- Implementation fees
- Installation fees
- Extended warranty offerings and associated fees
- Proprietary or third-party fees
- Maintenance and support fees
- If not included in base pricing, please provide and describe release cycle and fees associated with additional functionality.
- Fees for any tools that must be purchased to support enhancement to aforementioned modules in their native development environments
- Fees for software upgrades and patches
- Fees for disaster recovery services
- Any additional fee types associated with providing proposed services and not already specified.
- Fee increases over expected life of contract (if applicable)
- County may amend contracts under this RFP to serve additional County Departments, Components, or other County partners. Please provide a description of how if the County were to add additional units of service (e.g., users, facilities, modules, etc.) in the future, how those additional units might affect fees (e.g., such as through a volume discount mechanism).

These costs must be listed as line items and divided into which contract year they are proposed to be charged. For example, if the proposal includes \$5,000 of total training fees divided evenly over five (5) years, then the response shall include a line item for Training Fees showing \$1,000 of training fees in each of the initial five (5) years of the planned contract.

If the proposal includes the option of either a County hosted or third-party hosted system, then the Fees response shall include applicable fees for each option. The Proposer shall document and cost assumptions made in developing the above Fees proposal response.

The County reserves the right to withhold ten (10) percent of the final payment until the BIAM System is operating successfully in the final production for at least sixty (60) days.

5.7. Completed Proposal Certification (see the below form)

PROPOSAL CERTIFICATION
RFP #2018-101 Building Information and Asset Management System

Submitted by: _____
(Must be entity's full legal name, and State of Formation)

The undersigned, through the formal submittal of this Proposal response, declares that he/she has examined all related documents and read the instruction and conditions, and hereby proposes to provide the services as specified in accordance with the RFP, for the price set forth in the Proposal documents.

Proposer, by signature below, hereby represents as follows:

- (a) That no County elected official, officer, agent or employee of the County is personally interested directly or indirectly in this contract or the compensation to be paid hereunder, and that no representation, statement or statements, oral or in writing, of the County, its elected officials, officers, agents, or employees had induced it to enter into this contract and the papers made a part hereof by its terms;
- (b) The Proposer, and each person signing on behalf of any Proposer certifies, in the case of a joint Proposal, each party thereto, certifies as to its own organization, under penalty of perjury, that to the best of their knowledge and belief:
 - 1. The prices in the Proposal have been arrived at independently, without collusion, consultation, communication, or agreement for the purpose of restraining competition as to any matter relating to such prices with any other Proposer or with any competitor;
 - 2. Unless otherwise required by law, the prices which have been quoted in the Proposal have not been knowingly disclosed by the Proposer prior to the Proposal deadline, either directly or indirectly, to any other Proposer or competitor;
 - 3. No attempt has been made nor will be made by the Proposer to induce any other person, partnership or corporation to submit or not to submit a Proposal for the purpose of restraining trade;
- (c) The Proposer fully understands and submits its Proposal with the specific knowledge that:
 - 1. The selected Proposal must be approved by the Board of Commissioners.
 - 2. This offer to provide services will remain in effect at the prices proposed for a period of not less than ninety (90) calendar days from the date that Proposals are due, and that this offer may not be withdrawn or modified during that time.
- (d) That this Proposal is made without connection with any person, firm or corporation making a bid for the same material, and is in all respects, fair and without collusion or fraud.
- (e) That the Proposer shall use recyclable products to the maximum extent economically feasible in the performance of the contract work set forth in this document.
- (f) That the Proposer accepts all terms and conditions contained in this RFP and that the RFP and the Proposal, and any modifications, will be made part of the contract documents. It is understood that all Proposals will become part of the public file on this matter. The County reserves the right to reject any or all Proposals.
- (g) That the Proposer holds current licenses that businesses or services professionals operating in this state must hold in order to undertake or perform the work specified in these contract documents.
- (h) That the Proposer is covered by liability insurance and other insurance in the amount(s) required by the solicitation and in addition that the Proposer qualifies as a carrier insured employer or a self-insured employer under ORS 656.407 or has elected coverage under ORS 656.128.
- (i) That the Proposer is legally qualified to contract with the County.
- (j) That the Proposer has not and will not discriminate in its employment practices with regard to race, creed, age, religious affiliation, sex, disability, sexual orientation, gender identity, national origin, or any other protected class. Nor has Proposer or will Proposer discriminate against a subcontractor in the awarding of a subcontract because the subcontractor is a disadvantaged business enterprise, a minority-owned business, a woman-owned business, a business that a service-disabled veteran owns or an emerging small business that is certified under ORS 200.055.

(k) The Proposer agrees to accept as full payment for the services specified herein, the amount as shown in the Proposal.

Resident Bidder, as defined in ORS 279A.120

Non-Resident Proposer, Resident State _____
Oregon Business Registry Number _____

Contractor's Authorized Representative:

Signature: _____ Date: _____

Name: _____ Title: _____

Firm: _____

Address: _____

City/State/Zip: _____ Phone: () _____

e-mail: _____ Fax: _____

Contract Manager:

Name _____ Title: _____

Phone number: _____

Email Address: _____

**ATTACHMENT A
SOFTWARE SURVEY**



Clackamas County Facilities Management

Asset Management Questions

*As used in Attachment A, “Y” means Yes, “N” means No, and “D” means Developing

1. Maintenance Management			
These questions address the Work Order Control Management requirements			
Criteria		Y/N/D*	Comments
Work Order Management			
1.1.	Can the Users perform ad hoc queries of work orders using multiple complex search criteria and multiple sorting criteria?		
1.2.	Can the work orders be assigned priorities?		
1.3.	Can work orders be defined according to the type or scope of work and skill level required to assist in assigning to staff?		
1.4.	Does the software have the ability to create a daily schedule of work orders for employees and crews?		
1.5.	Is work order information integrated with estimate information allowing for cost comparisons and work progress tracking during and after completion of the work order?		
1.6.	Does the software have the ability to store and view documents associated with work orders?		
1.7.	Does the software have the ability to store worker comments anytime and upon completion of work?		
1.8.	Can the software record information about work requestors such as name, phone number, department, and email address?		
1.9.	Can the software record information about contractors and rental equipment including charge out rates?		
1.10.	Can the software record information about who makes any changes or updates to a work order? Can that information be printed out in a report?		
1.11.	Does the software track employee information including name, identification number, salary, charges out rates, schedule, leave, purchase limits etc.?		
1.12.	Can the software create and manage projects consisting of an unlimited number of sub-projects, work orders, or activities?		

1.13.	Can the software reference multiple account numbers to which costs can be charged on a work order?		
1.14.	Can unlimited number of material, labor, invoices and miscellaneous Cost items be posted to work orders and tracked?		
1.15.	Can the work order entry software be configured to generate quality assurance questionnaires, surveys, etc., and automatically report the results?		
1.16.	Can the software manually or automatically send out customized messages as the work is being performed (i.e. parts on order, delay due to emergency, etc.)?		
1.17.	Can work orders be routed for review and approval?		
1.18.	Are space, location, equipment, and asset descriptions and work procedures included on work orders?		
1.19.	Are users able to query work orders in real time using wireless hand held devices?		
1.20.	Are users able to enter time on work orders, real time on hand held devices?		
1.21.	Are users able to attach material related to work orders on hand held devices in real time?		
1.22.	Can Job Cost information be flagged to be bill at the completion of the work order?		
1.23.	Does the software allow customers to create work requests via an on-line form utilizing standard web browsers?		
1.24.	Can the software be configured such that completion of certain fields of the work request form is mandatory?		
1.25.	Is a work order request number assigned and reported to the customer upon submission of a work request?		
1.26.	Are incoming work requests time stamped?		
1.27.	Can search results be displayed in reports that include links to detailed records?		
1.28.	Does the software provide graphical access to work orders via floor plans?		
1.29.	Can authorized customers view cost details such as labor, material, rental, and outside services?		
1.30.	Can the reports be generated by the customer, including cost summary reports and work order status reports?		
1.31.	Does the software provide configurable email links to departmental functions and employees?		
1.32.	Can the product be branded with the County logo/graphics?		
1.33.	Does the software maintain a database of information on assets and equipment, including such items as type and location of asset, manufacturer's specifications, serial number, etc.?		
1.34.	Can the software bar code assets and equipment to verify work performed on the correct items?		

1.35.	Can any asset be designated as related to any another asset with an unlimited number of such relationships?		
1.36.	Does the software maintain the preventive maintenance (PM) histories of assets, equipment and locations?		
1.37.	Can priorities be assigned to assets and equipment, and can PM priorities reflect the asset and equipment priorities?		
1.38.	Can preventive maintenance activities be scheduled on specified dates, days of the week, days of the month, 1st Monday of work day of the month, week of the month, or other user defined schedules, and can be restricted to specified seasons?		
1.39.	Are preventive maintenance orders part of a hierarchical arrangement whereby the scheduling of certain PM orders prevents the scheduling of other PM orders so that, for example, quarterly or semi-annual PM orders should not be scheduled at the same time as an annual PM order?		
1.40.	Can existing PM plans be copied to create new PM plans?		
1.41.	Can the software project manpower requirements, including type and number of personnel, for a specified future time period, such as a week, month, or year, based on information in preventive maintenance and work order management plans?		
1.42.	Can preventive maintenance orders and on demand orders have multiple task or sub-work orders that can be marked completed without completing the entire order?		
1.43.	Can the software generate reports showing the completion percentages of tasks or entire orders?		
1.44.	Can the software generate reports of overdue work orders or PM orders?		
1.45.	Can the software generate reports detailing adherence of actual PM and materials used?		
1.46.	Can the software generate any type of report that the user wants using existing fields?		
1.47.	The ability to retire assets and unretired to control work assignments.		
1.48.	The ability to assign due dates to the work order and notification of overdue work orders		
1.49.	Can notify staff when assigned work orders in real time.		
Timecard			
1.50.	Ability to record non-working time by category.		
1.51.	Timesheet entries should link to work orders.		
1.52.	Time reporting capability to support Payroll requirements (option).		
1.53.	Ability to make corrections (hours put to incorrect Work Task, time category incorrectly assigned, etc.) after a work order has been completed.		

1.54.	System should provide ability to indicate an error message describing the reason for the correction.		
1.55.	Time sheet entries should be added from the start/stop actions on the work task (whether from a mobile device or an application work task screen).		
1.56.	Time entries should be editable on the Timesheet screen.		
1.57.	Timesheet should only show active work orders.		

2. Space & Asset Management (Space, People, Equipment)

These questions address the requirements for establishing a normalized database for managing physical space, including buildings and other facility structures, floors, and rooms. This includes capturing costs and parameters to enable charge-backs and classification of space.

	Criteria	Y/N/D*	Comments
2.1.	Does the system provide the ability to capture and maintain information about buildings and other structures?		
2.2.	Does the system provide the ability to track non-building entities such as grounds, antennas, structures, utilities or parking lots?		
2.3.	Does the system have the ability to track property like a building?		
2.4.	Can the system capture the following building characteristics:		
a.	Owned vs. leased status?		
b.	Can a building belong to multiple departments or groups?		
c.	Total gross, rentable, and usable area measurements?		
d.	Year built, year purchase, and purchase cost		
e.	Overall Building Condition from inspections and work orders (excellent, good, poor, etc.) and a report be generated to show the history of the building condition.		
f.	Maintenance, construction, operations and historic costs?		
g.	Utilization headcount by department (organization)?		
h.	Miscellaneous user defined text attributes? How many?		
i.	Miscellaneous user defined numeric attributes? How many?		
j.	Building appraised value tracking		
k.	Track estimated value of building contents?		
2.5.	Can the system capture the following building location characteristics:		
a.	Address (street, campus, city, county, state, country, postal code, etc.)?		
b.	Metropolitan Statistical Area?		
c.	Groupings of locations based upon customer-defined regions?		
d.	Amount of acreage		

2.6.	Does the system provide the ability to capture and maintain information about floors and/or buildings?		
2.7.	Can the system capture the following floor characteristics:		
a.	Functional category and sub-category? (I.e., Does the system provide a hierarchical classification for floors?)		
b.	Total gross, rentable, and usable areas?		
c.	Cost for chargeback or auditing purposes? Indirect cost recovery reporting?		
d.	Miscellaneous user defined text attributes? How many?		
e.	Miscellaneous user defined numeric attributes? How many?		
2.8.	Does the system provide the ability to capture and maintain detailed information about rooms (spaces) on floors?		
2.9.	Does the system utilize a relationship hierarchy for location information (e.g., site/campus-building-floor-space)?		
2.10.	Can the system capture the following space characteristics:		
a.	Area?		
b.	Cost for chargeback or auditing purposes? Indirect cost recovery reporting?		
c.	Classification by user defined space standards?		
d.	Occupancy status?		
e.	Capacity?		
f.	Miscellaneous user defined text attributes? How many?		
g.	Miscellaneous user defined numeric attributes? How many?		
2.11.	Does the system support both imperial and metric area measurements?		
2.12.	Does the system allow the use of any measurement standard (e.g., BOMA, IFMA, corporate-defined, and/or a combination) to determine the area of spaces?		
2.13.	Does the system provide the ability to track space by user defined location groupings?		
2.14.	Does the system provide the ability to group multiple spaces into user-defined zones (e.g., Marketable, Fire & Safety, HVAC, etc.)?		
2.15.	Does the system utilize a relational hierarchy for zones (e.g., building-floor-zone)?		
2.16.	Can a space belong to multiple zones?		
2.17.	Can the system track space assignment/allocation by organizational department?		
2.18.	Can the system track space usage or occupancy by organizational department (i.e., usage by a department other than the one assigned)?		
2.19.	Can the system capture space usage or occupancy by personnel?		

2.20.	Can the system accommodate multiple users or proportional occupancy of space (i.e., "shared spaces")?		
2.21.	Can proportional usage be allocated by percentage of use?		
2.22.	Can usage charge back costs be calculated based on department, activity, and/or personnel allocations of space?		
2.23.	Does the system provide the ability to associate billing/accounting IDs to spaces (to facilitate accounting functions for charge backs)?		
2.24.	Does the system provide the ability to compare:		
a.	Space capacity to actual usage?		
b.	Occupancy status indicator to actual occupancy (e.g., "vacant" with assigned users)?		
2.25.	Does the system provide the ability to retrieve specific records using a variety of search parameters and filters?		
2.26.	Can the system interface with AutoCAD, Revit, or other Autodesk software?		
2.27.	Does the system provide the ability to search and view detail records by drilling- down from:		
a.	Buildings to floors?		
b.	Floors to spaces?		
<p>These questions address the requirements for establishing a normalized database for managing and tracking detailed information about organizations and personnel. "Personnel" includes employees, contractors, temporary staff, students, and/or any other entities that are assigned to or occupy facility space.</p>			
Criteria		Y/N/D*	Comments
2.28.	Does the system accommodate an unlimited department (organization) hierarchy?		
2.29.	Can the system capture the following personnel characteristics:		
a.	Name, title, email address?		
b.	Multiple space assignments (locations)?		
c.	Departmental (organization) assignment?		
d.	Primary and alternate telephone communications?		
e.	Position classification?		
f.	Space standard entitlement?		
g.	Equipment assigned?		
h.	Miscellaneous user defined text attributes? How many?		
i.	Miscellaneous user defined numeric attributes? How many?		
2.30.	Does the system provide the ability to roll-up building area and headcount totals by department?		
2.31.	Does the system provide the ability to assign functional utilization based on Program Classification Structures (admin, research, instruction, etc.)?		
2.32.	Does the system provide the ability to functionalize a room based on structure?		

These questions address the requirements for establishing a normalized database for tracking the location of furniture and equipment, including sub-assembly components.			
Criteria		Y/N/D*	Comments
2.33.	Does the system track equipment identified by a unique code such as bar code, serial or property number?		
2.34.	Can the system capture the following equipment characteristics:		
a.	Location?		
b.	Date of purchase or installation.		
c.	Cost of asset or equipment.		
d.	Functional category? Functional sub-category? (I.e., Does the system provide a hierarchical classification of equipment?)		
e.	Dimensions?		
f.	Miscellaneous user-defined text attributes? How many?		
g.	Miscellaneous user-defined numeric attributes? How many?		
h.	Life expectancy of the equipment?		
2.35.	Can the system track component assemblies for equipment?		
2.36.	Can equipment be assigned to employees?		
2.37.	Can equipment be assigned to rooms?		
2.38.	Can equipment be assigned to departments?		
2.39.	Can the system utilize a bar code system for inventory or asset management?		
2.40.	Can the software store information on assets and equipment such as buildings, rooms, indoor/outdoor spaces and facilities, infrastructure, tools, supplies, vehicles, trees, manholes, and utility poles, ground area and other items of value to the internal organization?		
2.41.	Are asset and equipment work order histories, including accumulated costs recorded, and are these records directly available from asset record display windows?		
2.42.	Are asset and equipment records linked to detailed stored specifications and schematics and viewable from the asset record?		
2.43.	Can Asset records contain detailed lockout tag-out procedures, automatically printed on Work Orders?		
2.44.	Can asset records contain or reference confined space permits and instructions?		
2.45.	Do asset and equipment records include user-definable fields indicating the presence and nature of hazardous materials?		
2.46.	Can asset and equipment records contain a history of condition assessments?		
2.47.	Can original cost of the asset and equipment be recorded?		

2.48.	Can longevity (lifecycle) of an asset or equipment be recorded?		
2.49.	Can longevity (lifecycle) be adjusted at any time?		
2.50.	Can the software generate a report of estimated replacement cost of an asset or equipment for a date range based on its longevity (lifecycle) entry?		
2.51.	Can asset and equipment records contain cost center account numbers to which costs can be charged by default?		
2.52.	Can asset and equipment records contain or reference information on warranties?		
2.53.	Can work order data entry or queries alert the user to the existence of warranties on the assets referenced by the work order?		
2.54.	Are costs automatically rolled up to appropriate facility, building, space, room, department, or account records?		
2.55.	The ability to schedule the use of rooms or conference rooms by date, times, and the ability to repeat meetings.		
2.56.	The ability to assign select users to schedule rooms or conference rooms		
2.57.	The ability to show conference room capacity, available equipment, and special features.		
2.58.	The ability to create conference room usage cost and charge to specific funding accounts or work orders.		
2.59.	The ability to automatically assign usage cost based on time of day use of conference rooms. (i.e. during normal hours vs. after-hour)		
2.60.	The ability to show conference room schedule on a monitor or special web site.		

3. Inventory Control

These questions address the inventory control requirements.

	Criteria	Y/N/D*	Comments
3.1.	System ability to confirm receipt of materials in the Stockroom.		
3.2.	System should allow for issuing of materials in different units of measure from purchased units (i.e., bulk materials issued by the piece).		
3.3.	Ability to issue and deliver equipment needed for the work to job sites. Ability to track equipment/shared tools, associate these with the work order and (perhaps) not allow work order to be marked complete until equipment/tools are returned.		
3.4.	System should be able to print delivery labels for issued materials.		
3.5.	Issues from inventory require Work Orders for allocation and assignment.		

3.6.	System should provide ability to store and track multiple locations for a single item type (e.g. stock room overflow).		
3.7.	Technicians should have the ability to see stock levels on parts.		
3.8.	System should provide approval process for various dollar levels.		
3.9.	Can your system allow parts to be committed directly to work orders?		
3.10.	Can inventory be received directly into work orders?		
3.11.	Can your system support multiple inventory verification methods (Annual or Cycle)?		
3.12.	Can spare parts be tracked by location?		
3.13.	Can your system track item costs and balances by location (site, storeroom, bin) and total?		
3.14.	Can your system track minimum/maximum levels and provide notification for replenishment? Can it replenish stock automatically?		
3.15.	Can your system support multiple site storerooms (satellite)?		
3.16.	Can your system provide for transfers between sites/storerooms?		
3.17.	Does your system support bar code readers for asset and inventory issues and cycle counts?		
3.18.	Maintain transaction log history.		
3.19.	Enable configuration by role of rights to enter data.		
3.20.	Can your system stamp all transactions with user, date, and time?		
3.21.	Can your system maintain a history file for parts and material usage against appropriate location, asset, equipment, project, and work order?		
3.22.	Can your system release the work order for scheduling upon receipt of all materials?		
3.23.	Provide access to on-line help.		
3.24.	Allow printing of forms, tables, data fields, screen shots.		
3.25.	Can your system create purchase requisitions and purchase orders for materials and services?		
3.26.	Can your system track descriptions, vendors, work orders, dates and the costs for all purchases?		
3.27.	Can your system track and verify accounting codes?		
3.28.	Can your system track reasons for inventory adjustments and who did those adjustments?		
3.29.	Can you system reset the variance amount after an annual or cycle count?		
These questions address the requirements for establishing a normalized database for managing and tracking detailed information about the procurement of inventory.			
3.30.	Can your system display current available and usable on-hand quantity of each stock item?		

3.31.	Can your system display current stock levels at all relevant levels?		
These questions address the requirements for establishing a normalized database for managing and tracking detailed information about the requisition of inventory.			
3.32.	Can you create a receiving report?		
3.33.	Does your system record authorization of receipt by appropriate individuals?		
3.34.	Can you receive goods without a requisition/purchase order reference?		
3.35.	Can you create/update bin card per item?		
3.36.	Can you update stock records with quantity received?		
3.37.	Can your system generate physical inventory count sheets?		
3.38.	Can your system support multiple inventory storage locations (Aisle, Bin, Slot, etc.)?		
3.39.	Can your system record warehouse-to-warehouse transfers?		
3.40.	Can your system flag items as hazardous, as appropriate?		
3.41.	Can you update stock records as needed?		
3.42.	Can you record stock adjustments?		
These questions address the requirements for establishing a normalized database for managing and tracking detailed information about the issue of inventory.			
3.43.	Can you receive a stock requisition?		
3.44.	Can you validate the requisition?		
3.45.	Can you route the requisition to the appropriate warehouse/store?		
3.46.	Can your system group requisitions into trips?		
3.47.	Can you verify that a requestor is authorized, if appropriate?		
3.48.	Can you enable backorder for unfulfilled items?		
3.49.	Can you display current location(s) for requisitioned items?		
3.50.	Can you create pick list sorted by stock location?		
3.51.	Can you update bin cards?		
3.52.	Can your system record stock adjustments if a pick list includes damaged/lost/missing stocks?		
3.53.	Can you modify pick list as appropriate?		
3.54.	Can you group orders by location and trip to facilitate delivery?		
3.55.	Can you record stock issues/update quantity on hand?		
3.56.	Can your system update stock records?		
These questions address the requirements for establishing a normalized database for managing and tracking detailed information about surplus of inventory.			
3.57.	Can surplus items be added to inventory and given an id or tracking number (possible bar code)?		
3.58.	Can it track the following items		
a.	Who the item was received from - Department, Name, Phone Number		

b.	Condition of the surplus		
c.	Description of the surplus		
d.	Date received in surplus and by whom		
e.	How the item was originally purchased		
f.	The work order to have the item delivered to surplus		
g.	Item dimensions and weight		
h.	The ability to attach a photo of the item		
3.59.	The ability to create a pick ticket, reserve items for re-delivery		
3.60.	The ability to track the disposal of the item, date of disposal, and reason (gave to school, trashed, due to damage, etc.)		
3.61.	The ability to assign location within surplus warehouse (isle, bay, shelf)		

4. Utility Management

These questions address the utility management requirements.

Criteria		Y/N/D*	Comments
4.1.	Ability to manage all utilities including electric, gas, water, sewer, fuel oil, propane, trash, waste, telephone and other utilities		
4.2.	Tracks essential account, vendor building and user information		
4.3.	Tracks basic utility billing determinants on monthly bills for each account and/or meter including billing periods, billing period consumption, billing period cost and average period unit cost. Bills are to be tracked by month, year and building		
4.4.	Ability to track user-defined data such as hours of use, number of occupants, outside temperature etc.		
4.5.	Provides use and cost budget function for monthly and annual budget analysis		
4.6.	Customizable user-defined advanced utility bill determinants including power factor, time-of-use, taxes, service charges and deregulated bill determinants		
4.7.	Easy customized reports using any reporting field		
4.8.	Easily exports data to any spreadsheet format		
4.9.	Works with Energy Star Portfolio.		
4.10.	Provides virtual and sub-meter tracking. Sub-meter tracking will support internal organization chargeback requirements		
4.11.	Utility bill validity checking with multiple parameter analysis		
4.12.	Consumptions		
4.13.	Costs		
4.14.	Utility meter management		

5. Inspections

These questions address the inspections requirements.

Criteria		Y/N/D*	Comments
5.1.	Allows client created facility inspection		
5.2.	Project life expectancy for use in capital planning		
5.3.	Allows for work orders to be assigned and tracked to an asset inspection		
5.4.	Configured asset inspection that result in a reportable condition score		
5.5.	Automatically create work orders from failed inspection points		
5.6.	Allow inspections to paused and continued on another date		
5.7.	Create user-defined inspection work orders		
5.8.	Perform inspections/routes with mobile device		
5.9.	Support multiple, customizable inspection formats for printing.		
5.10.	Track failed inspection points for which corrective work orders have not yet been created		
5.11.	Track pass/fail percentage for individual inspection points		
5.12.	Automatically attach a time stamp for each point of the inspection/route		
5.13.	Ability to access the full functionality of the inspections module through a mobile device (smartphone or tablet) using an app, a web site, or both (preferable). Fulfillment is expected to be fully compatible with iOS devices, Windows devices and Android devices.		
5.14.	Ability to easily generate related work requests relating to inspection		
5.15.	Ability to retrieve historical information relating to inspection.		
5.16.	Provide summary report of findings (including itemized work requests) following inspection.		
5.17.	Ability to generate customize templates to facilitate common inspections such as: a. Health and Safety (join occupational health and safety) b. Building Audits c. Level of Cleanliness		

6. Fleet Management

These questions address fleet management requirements.

Criteria		Y/N/D*	Comments
6.1.	Fully customizable self-service portal		
6.2.	Requesters can easily submit trip requests and check request status online		
6.3.	Automatically routes trip request to approval managers		

6.4.	Tracks availability and manages scheduling of vehicle and drivers		
6.5.	Displays scheduled trips on interactive calendar		
6.6.	Track schedule and unscheduled maintenance on vehicles		
6.7.	Track all vehicle purchases		
6.8.	Track vehicles assigned to departments or staff		
6.9.	Able to assign funding information to each vehicle		
6.10.	Track the life expectancy of a vehicle and its replacement cost		
6.11.	Capture vehicle information		
a.	VIN number		
b.	License Plate number		
c.	Make / Model / Model Year		
d.	User Defined attributes		
e.	Purchase Cost		
f.	Warranty Information		
6.12.	Ability to create invoices for charging services to vehicle user		
6.13.	Tracks all trip related costs		

7. Incidents

These questions address the incident tracking requirements.

	Criteria	Y/N/D*	Comments
7.1.	Litigation tracking		
7.2.	Ability to share information with departments to ensure we do not retain or engage companies with which we have had previous litigation		
7.3.	Ability to track all the steps in reporting the incident (what form, date sent, to whom, etc.)		
7.4.	Events capture (symptoms/impacts)		
7.5.	Ability to tie incident to asset/ location		
7.6.	Condition captured (weather, time of day, building condition)		
7.7.	Responses (who, when, how, costs, downtime)		
7.8.	Risk		
7.9.	Recommendations		
7.10.	Root causes		
7.11.	Debrief		
7.12.	Follow-up		

8. CAD

These questions address the system's capability to provide CAD functionality.

	Criteria	Y/N/D*	Comments
8.1.	Can the space inventory (IWMS) database be created and maintained without utilizing CAD functionality?		

8.2.	Can the software work with AutoCAD, Rivet, or other Autodesk software?		
8.3.	Does the system provide the ability to link graphic files to the database, rather than embedding data in the drawing?		
8.4.	Is the database used for the drawing environment the same one that is accessed through non-CAD forms and/or reports?		
8.5.	Is the database automatically updated when the shape of a linked space is changed on the drawing?		
8.6.	Explain how the data is stored and how the database and drawings are kept in sync.		
8.7.	Can the drawing for a project not affect the database until a project is completed?		
8.8.	Can the system perform an audit to compare the area of a floor with the total of the areas of all spaces on the floor?		
8.9.	Can the system automatically recalculate department, floor and room areas as boundaries change?		
8.10.	Can the system produce a drawing (graphic report) that indicates the location of all space occupied by departments or programs?		
8.11.	Can the system produce a single graphic report of departmental locations on multiple floors and/or in multiple buildings (e.g., 4 floors of Building A and 6 floors of Building B)?		
8.12.	Explain the process required to regenerate the graphic reports after changes are made in the IWMS database (e.g., departmental reassignments).		
8.13.	Does the graphic report include a total of the square footage for the specified criteria (e.g., total area occupied by each department) for all floors and buildings in the report?		
8.14.	Can the floors/buildings for the query be selected or deselected without recreating the drawing?		
8.15.	Does the system support AutoCAD drawing files (*.dwg) inside an AutoCAD session without limiting access to native commands and functions of that product?		
8.16.	Can users access graphical reports on the web without having AutoCAD loaded on their PC?		
8.17.	Can users search CAD drawings on the web for specific rooms, people and/or assets?		
8.18.	Can users dynamically access current information in the database directly from a web version of the CAD floor plan?		
8.19.	Can multiple floors and multiple buildings be viewed in a single query on the web to eliminate the need to open multiple individual floor plans?		

9. Move Management

These questions address the system's capability to support operational planning and moves/adds/changes management. They also address the ability to track transactions required to accurately document move activities.

	Criteria	Y/N/D*	Comments
9.1.	Does the system create move reservations?		
9.2.	Can the system create alternative move scenarios?		
9.3.	Can the system group multiple personnel and locations under one move project and/or scenario?		
9.4.	Can the system track detailed move costs?		
9.5.	Does the system automatically update all location information for personnel when the move is completed?		
9.6.	Can the system automatically update status information for the associated spaces when the move is completed?		
9.7.	Does the system maintain a historical record of move transactions?		
9.8.	Does the system provide the ability to create and display move scenarios using a floor plan?		
9.9.	Can a Move Scenario that spans multiple buildings and multiple floors be shown graphically in a single drawing?		
9.10.	Can a Move Scenario that requires multiple buildings and multiple floors be manipulated from a single view?		
9.11.	Can a move coordinator select one or more additional services for each person in a move project?		
9.12.	Are work orders generated when a move is scheduled?		
9.13.	Can the accounting information to be adjusted based on the final move project?		
9.14.	Can the requesting department be charged back for actual move costs?		

10. Project Management

These questions address the Project Management requirements

	Criteria	Y/N/D*	Comments
10.1.	Does the system allow staff to input their time (hours) worked on construction and renovation projects, from both local and remote sites?		
10.2.	Does the software allow management to review, edit, or delete all time transactions provided by staff? Once reviewed, can staff update time information?		
10.3.	Does the software provide a summary page for each project?		
10.4.	Does the software show the amount of money budgeted, amount expended, and remaining budget for the entire project?		
10.5.	Does the software show the amount of money budgeted, amount expended, and remaining budget for each contract or material purchase within the project?		

10.6.	Does the software provide the ability to assign a type of time from a user managed set of billable and non-billable time types? Can time be distinguished as billable or non-billable?		
10.7.	Does the software allow the user to define a variety of project types to include different, user-defined fields, milestones and budget codes?		
10.8.	Does the software allow the user to define different types of contracts to support the capital projects, such as architectural/engineering, construction, furniture/fixtures, telecommunications, etc.?		
10.9.	Can the software track major revisions to a project that might affect the schedule, funding or budget?		
10.10.	Can the software interface with Microsoft Project?		
10.11.	Does the software have its own integrated project tracking capability?		
10.12.	Does the software provide for a user-defined set of rates for estimating or billing?		
10.13.	Does the software maintain project histories?		
10.14.	Does the software track "sources of funds" for projects?		
10.15.	Does the software allow users to enter change requests?		
10.16.	Can a report be generated to show all costs related to projects?		
10.17.	Does the software allow the user to attach all project information such as drawings, engineering analysis, notes from telephone conversations, etc. to the capital project?		
10.18.	Does the software allow documents to be stored in separate folders?		
10.19.	Can all project information, documents, and reference materials be exported as either a PDF or Office Suite product?		
10.20.	Does the system support hold-back or retainage on service invoices for a project by a user-defined percentage?		
10.21.	Can the system support the release of the retained invoice amount at the end of the project as well as at any user-defined point in time?		
10.22.	Does the system support the association of single or multiple disadvantaged vendor classifications (i.e. Minority, Women-owned, Small Business, etc.)?		
10.23.	Is the system mobile capable with any phone or tablet, regardless of brand or operating system?		
10.24.	Will users automatically receive updates to the software on their mobile devices without having to choose to install an updated version?		
10.25.	Is there a way for users to see a listing of all of their action items in one place?		
10.26.	Are users alerted through the system if a task they are assigned to is overdue?		

10.27.	Are users able to view and mark up CAD drawings and other file types on their mobile device?		
11. Lease and Property Management			
These questions address the system's capability to track information and documents related to lease and occupancy agreements.			
Criteria		Y/N/D*	Comments
11.1.	Does the system provide the ability to capture and maintain information about land inventory (properties and/or parcels)?		
11.2.	Can the system capture the following property characteristics:		
a.	Location?		
b.	Land attributes?		
c.	Land condition?		
d.	Miscellaneous user-defined text attributes? How many?		
e.	Miscellaneous user-defined numeric attributes? How many?		
11.3.	Can the system capture the following parcel characteristics:		
a.	Geographic location (i.e. geographic coordinates)?		
b.	Miscellaneous user defined text attributes? How many?		
c.	Miscellaneous user defined numeric attributes? How many?		
d.	User-defined attribute groups to enforce consistency?		
11.4.	Can the system capture the following lease characteristics:		
a.	Leased area?		
b.	Location?		
c.	Tenant and landlord name, address, contact person?		
d.	Miscellaneous user defined text attributes? How many?		
e.	Miscellaneous user defined numeric attributes? How many?		
f.	Term?		
11.5.	Does the system provide the capability to capture and maintain sub- leases as separate entities, with link to the parent lease?		
11.6.	Can the system track leased space from the landlord's perspective?		
11.7.	Can the system track leased space from the tenant's perspective?		
11.8.	Can the system capture all lease option information including renewal, early termination, additional space, etc.		
11.9.	Does the system track lease amendments?		
11.10.	Does the system track lease prohibitions?		
11.11.	Does the system track tenant and/or landlord rights?		
11.12.	Does the system track lease history?		

11.13.	Can the system capture all inspection information including schedules, contacts, and reports?		
11.14.	Can the system track legal agreements associated with leases including offers, agreements, sub-leases, listing agreements, termination letters, etc.?		
11.15.	Can lease documents be viewed in the native form?		
11.16.	Can the system capture profile information about personnel associated with the lease including landlord and/or tenant staff, service contacts, inspectors, etc.		
11.17.	Does the system support multiple buildings per lease?		
11.18.	Does the system support multiple leases per building?		
11.19.	Does the system track critical dates and support automatic or "tickler" notifications?		
11.20.	Does the system track critical dates for:		
a.	Expirations?		
b.	Options?		
11.21.	Does the system create rent payment schedules?		
11.22.	Does the system track leased parking spaces?		
11.23.	Does the system track leased 'non-billed' space?		
11.24.	Does the system track market value?		
11.25.	Does the system track original cost?		
11.26.	Does the system track tax information?		
11.27.	Can the system track operating expenses?		
11.28.	Does the system track vacant space?		
11.29.	Does the system track occupancy characteristics?		
11.30.	Does the system accommodate sub-leases with different duration, costs and characteristics than the parent lease?		
11.31.	Does the system support normalized rent calculations?		
11.32.	Does the system allow for specific leases language to be captured from the lease agreement?		
11.33.	Can the system separate the duties associated with the rent payment process?		

12. Reports

These questions address the system's capability to produce reports in pre-configured and/or user-specified formats, and the system capability to provide additional report writing functionality.

Criteria		Y/N/D*	Comments
12.1.	Does the system's report writing tool support point-and-click/drag-and-drop report generation and drill-down functions?		
12.2.	Can the end-user easily reconfigure standard reports and queries?		
12.3.	Can calculations be performed in the report (e.g., determine the percent of total rentable floor space occupied by each department)		
12.4.	Can the results of the query be displayed as pie or bar charts?		

12.5.	Can the system access and sort information and produce one-time only or recurring reports containing any combination of data within the database?		
12.6.	Does the system have the ability to draw on information from all systems modules and assemble into custom report and formats?		
12.7.	Does the system have the ability to name and save user configured reports?		
12.8.	Does the system provide a method of grouping related reports together within the menu structure for ease of use?		
12.9.	Does the system provide the ability to report from multiple databases/tables concurrently?		
12.10.	Can the system enable the user to develop quick ad hoc reports to meet user-specified information requirements?		
12.11.	Can the system export report data to Excel, PDF, Text, and CSV?		
12.12.	Can a business user create reports in a “point and click” manner by simply choosing business objects (vs. SQL)?		
12.13.	Is there a wizard to walk a business user through creating a report?		
12.14.	Can reports be configured to be delivered automatically to users on a scheduled basis?		
12.15.	Can charts and graphs be created within the system without the need to purchase a third party reporting tool.		
12.16.	Does the system’s ad-hoc reporting have the ability to generate XML output without the need to purchase a third party reporting tool?		
12.17.	Does the system provide customizable in-application dashboards which provide up-to-the minute visualizations of system data and statistics?		
12.18.	Can a user set their default home screen to be their customized dashboard?		
12.19.	Does the system provide executive dashboards, which show interactive visualizations of high-level aggregated metrics across all lease, project, facility and space information contained in the system?		

13. Technical Issues

These questions address the system’s technical operability requirements

	Criteria	Y/N/D*	Comments
13.1.	What documented help is available to users?		
13.2.	Can accessibility be based on tiered roles assigned to users?		
13.3.	Does the system provide secure access to buildings/land inventory records by user authorization		

13.4.	Is the system deployable over the web? What technology is utilized to provide this capability? Is the web solution the same as offered on- premise (if applicable)?		
13.5.	What additional hardware and software components are utilized to deploy the software over the web?		
13.6.	Does the system provide access in the field to the entire application using iOS, Android or Windows Mobile devices		
13.7.	Does the system provide Single Sign-On authentication that is compatible with our existing systems? What technology is used to support this requirement and is there an associated cost to implement?		
13.8.	Does the system permit data load via both ETL programs and spreadsheet comma delimited files with scripted utilities?		
13.9.	Can the system import/export to text data and Excel spreadsheets?		
13.10.	Do you provide the ability to easily integrate with existing systems?		
13.11.	Can the system import/export data using tools available from within the proposed software interface or with third party data access tools? – At a minimum, delimited text file support is essential.		
13.12.	Is the software provided as an On-Premise solution, Hosted solution or Software as a Service?		
13.13.	If On-Premise, please provide suggested architecture requirements for a Company of similar size and requirements and estimated cost for hardware, platform software and installation within the existing IT environment		
13.14.	If On-Premise, how often are updates and upgrades provided and is there a cost associated with receiving updates or upgrades or installing the updates or upgrades?		
13.15.	If Hosted, is the software provided the same as you provide to your on- premise customers?		
13.16.	If Hosted, how often are updates and upgrades provided and is there a cost associated with receiving updates or upgrades or installing the updates or upgrades? Are updates and upgrades provided at the same frequency as your on premise products?		
13.17.	If Hosted, are there separate License, Maintenance and Hosting charges? How are those charges calculated?		
13.18.	If Hosted, what is the delay between the release of a new update and the installation and availability of the new functionality to our users?		

13.19.	If Software as a Service, what is your scheduled maintenance window? Can this maintenance window be customized to accommodate our business cycles? How frequently is maintenance actually performed and what is the impact on customers?		
13.20.	If Software as a Service, is this a shared database environment?		
13.21.	Is the system accessible from a standard browser without plug-ins using desktop, Laptop, tablets and/or smartphones? What browsers and versions are supported?		
13.22.	Does the system scale to unlimited concurrent users with distributed access to query and modify data across multiple sites at the same time without loss of control or corrupting data?		
13.23.	How do you address the need for Disaster Recovery safeguards? How is the cost calculated for selecting this option?		
13.24.	Please walk through what process our users or IT staff would go through if the system should experience performance degradation or system failure.		
13.25.	Systems in place to monitor and alert the vendor to such problems		
13.26.	Notification methods (for our company to contact vendor and vice versa)		
13.27.	Troubleshooting methodologies for determining the cause of the performance issue (i.e., network, bandwidth, CPU limitations, memory limitations, space limitations, software service hang-ups, shared environment issues, peak usage concurrency, application bugs, etc.).		
13.28.	Support staff availability for troubleshooting (days and times)		
13.29.	Resolution timeframes for system failure and how often DR tests are conducted.		
13.30.	Adjustments available to remediate issues and prevent future issues. What options are covered by the proposed support costs and what options might be available at additional cost?		
13.31.	Are you the software solution vendor?		
13.32.	Is this a multi-tenant software-as-a-service solution where all customers are using the same hosted solution?		
13.33.	Does the system support SSL protocols?		
13.34.	Can you provide evidence of Security Certifications? If Yes, Please attach to this response		
13.35.	Do you own the hardware infrastructure on which the solution will be hosted or do you host with a third-party?		
13.36.	What is the number of concurrent users supported by a standard installation?		

13.37.	Are server virtualization technologies used and, if so, for what purpose?		
13.38.	Are dynamic load balancing mechanisms used to manage resources and/or provide failover protection? If utilized, is it required, available upon request, or available at additional cost?		
13.39.	If system redundancy is utilized, is high-availability an option? If so, is it required, available upon request, or available at additional cost?		
13.40.	Is local failover to another server an option?		
13.41.	Is geographic failovers to another datacenter an option?		
13.42.	Is Hot Backup technology supported?		
13.43.	How frequent and comprehensive are system snapshots?		
13.44.	Is network storage utilized?		
13.45.	What method is used, how quickly, and how comprehensively can data be restored in the event of a database failure?		
13.46.	Can the system interface with Microsoft Suite / Outlook?		
13.47.	Can the system upload files, PDFs, Word documents, JPEGs, etc. in Work Orders, Projects, and/or item-asset information?		
13.48.	Can data be partitioned and only specific users access that data based on user set-ups?		
13.49.	Is all data hosted in the continental United States?		

14. Services

These questions address the service support requirements to implement and operate the system, including software installation, data conversion and migration, critical training and

	Criteria	Y/N/D*	Comments
14.1.	Describe training options offered.		
14.2.	What are the per person costs for basic and advanced training on various features of the system?		
14.3.	Do you offer on-site training for groups of users and if so, what is the associated rate as well as any attendant costs?		
14.4.	Do you support a formal user group?		
14.5.	Do you support a client website/newsgroup?		
14.6.	Do you provide annual training conferences/seminars?		
14.7.	Do you have a staff of experienced database professionals available to assist in conversion to the specific system?		
14.8.	What are the costs associated with assistance with the conversion process? (Please describe fully)		
14.9.	Where is the technical support staff located?		
14.10.	Are technical resources available to supplement conversion to AutoCAD		
14.11.	How does the company accommodate service complaints and is there a guarantee associated with your product and/or services??		

14.12.	Do you provide on-going supplemental or refresher training on your product? What is the cost of this service?		
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15. Vendor Information

Please provide responses to the following in as complete a detail as possible. Attachments, copies, documentation, literature and contract documents are acceptable for further elaboration.

Criteria		Y/N/D*	Comments
15.1.	When was the company or department that provides the system founded?		
15.2.	How long have you been providing this software system?		
15.3.	Please provide names, addresses, and phone numbers for three (3) current client references. Referenced clients should be users (within the last twelve months) of the products and services proposed, with similar product scope and service level requirements.		
15.4.	Support: Is there telephone support? Is it part of the purchase price? What hours is support available? Is there a per-call charge? Do you have a web site? What guarantee is provided for support service?		
15.5.	Upgrades – License Agreements: How are upgrades or new releases provided? Is there a charge? How often are new releases or versions distributed? How is testing of the new release or version performed? How does the upgrade cycle for the web version compare to the upgrade cycle for the on-premise version (if applicable)? How long after the release of a new update is that version installed in the Hosted Environment?		
15.6.	Explain how client specific customizations will be changed with new upgrades.		
15.7.	What changes (if any) will be required to be made to Licensee’s customized areas? If so, please describe the cost to implement and maintain this change.		
15.8.	Please state what, if any, unique experience, qualifications, or competitive advantage that you possess that might be specific to this installation		
a.	Technical platforms		
b.	Unique functionality		
c.	Implementation support		
d.	Educational systems experience		
	If a customer request their data, how is that provided to them?		

16. Cost Driver Description

Please provide general information regarding the various factors driving fees to implement the proposed system.

Criteria		Y/N/D*	Comments
16.1.	What modules comprise your complete solution?		

a.	Have all of these modules been developed using a common set of tools over a single normalized database?		
b.	What tools must be purchased to support enhancement to these modules in their native development environments?		
16.2.	What is the estimated cost to implement future releases/functionality?		
16.3.	Is the software on premise, vendor hosted, customer hosted, or SaaS-based (Software as a Service)?		
16.4.	Please describe needed upgrades and patches.		
a.	Please describe the software upgrade schedules.		
b.	Please describe the software patch schedules.		
16.5.	Please describe disaster recovery services.		