

**Invitation for Bid
AEPA IFB #020-D
FACILITY MANAGEMENT SOFTWARE**

Part B – Technical Specifications

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1. Scope of Bid

AEPA is seeking a qualified, experienced contractor(s) who possesses the necessary resources and capabilities to acquire, deliver and perform the required supplies, materials, equipment and labor to all participating member states (up to 28) to:

- a. Respond to requests from a number of different types of educational, governmental and public institutions seeking facility management software.
- b. Provide a fully web-architected system to enhance workflow and increase production in facility management. The provider shall provide a complete and operational system per the requirements of this IFB.
- c. Include information and pricing for all software, specialized hardware, technical support, services, licensing, training, travel, and any related expenses necessary to implement the facility management software as described herein.
- d. Make the software operational on existing Buyer computer and network equipment. The software is to be delivered complete, fully functional, and fully documented, and the Buyer is to be trained on its operation.

The response to this solicitation is to reveal the breadth of the offering by identifying each of the areas where data are gathered; functionality by reviewing simultaneous data entry and native language implementation; technology by reviewing the design and installation requirements; and value by reviewing the software, update, training, services and annual maintenance costs. Bidders are encouraged to submit a bid on any and all products and services currently available.

All products offered must be considered new, unused, of the latest design and technology, and from the most current and popular facility management software product lines available.

AEPA and Member Agencies prefer a single vendor with a comprehensive array of products. However, Member Agencies may consider multiple awards to meet all the needs of our customer base.

2. Type of Bid

AEPA requests Bidders to submit primary pricing in the form of either “catalog pricing” or “line-item pricing.” This category is constructed in the form checked below. An explanation of each can be found in the table below. Additional information on permissible pricing strategies can be found in Part A – General Terms and Conditions under “Pricing.”

This bid is considered a:

YES	NO	TYPE OF BID
X		<p>CATALOG: A catalog bid is utilized when the products and/or services solicited are clearly identified with set and specific characteristics, attributes and configurations that are identifiable as a stand-alone single unit and can be listed and priced as a single unit with options that can be added to enhance and/or improve its operation and functionality. The Bidder offers a fixed discount(s) off retail price or prices in a Commercially Available Catalog. The discounts may be for the entire Commercially Available Catalog, for specific products, product lines, manufacturers or category of products as determined by the Bidder. See Pricing section for detailed information on Catalog Pricing.</p>
		<p>LINE ITEM: A line-item bid is utilized when the products and services solicited cannot be identified or listed as a single unit; consists of a number of different variables and configurations necessary to identify the specific project or application; the end product or solution is made of individually priced elements or components and the end product’s or solution’s cost is derived by the Vendor Partner specially prepared and providing a quote based on the project’s terms, conditions and requirements. See Pricing section for detailed information on Line-Item Pricing.</p>

3. Anticipated AEPA Member Agency Participation

State	Participate? Yes/No/ Undecided	Other States Member Sells In
California	Yes	AZ, NV
Colorado	Yes	
Connecticut	Yes	MA, ME, NH, NY, RI, VT
Florida	Yes	AL,GA
Georgia	Yes	
Illinois	Yes	
Indiana	Yes	
Iowa	Yes	IL, SD
Kansas	Yes	OK
Kentucky	Yes	AL, GA, LA, MS, NC, SC, TN, WV
Massachusetts	Yes	
Michigan	No	
Minnesota	Yes	SD
Missouri	Yes	AR, IL, LA, SD
Montana	Yes	ID
Nebraska	Yes	
New Jersey	Yes	
New Mexico	Yes	
North Dakota	Yes	
Ohio	Yes	
Oregon	Yes	

Pennsylvania	Yes	DE, HA, MD, NY
Texas	No	
Virginia	Yes	
Washington	Yes	AK, ID
West Virginia	Yes	
Wisconsin	Yes	
Wyoming	Yes	SD,UT
Total	26	

Please note that individual AEPA Member Agencies that have indicated that they intend to participate in any contract approved under this solicitation does not guarantee or mean that the individual AEPA Member Agency will enter into a contract with an AEPA approved Vendor Partner. Each AEPA Member Agency will make that determination after reviewing Vendor Partner responses and AEPA's recommendation for acceptance and bid award. The AEPA Member Agency's contracting decision shall be final.

4. Anticipated Volume

Facility Management Software is a currently held category for AEPA. The resulting bid will be an Indefinite Delivery, Indefinite Quantity (IDIQ) contract(s). AEPA Member Agencies estimate approximately \$11.3 million in sales in the first contract term. AEPA Member Agencies anticipate that purchase volumes will increase over the course of contract years two (2) through four (4). This information is provided as an aid to Bidders in preparing responses only. It is not to be considered a guarantee of volume under this IFB. The successful Vendor Partner's discount and pricing schedule shall apply regardless of the volume of business under the contract.

5. Voluntary Pre-Bid Conference Call

AEPA will host a voluntary pre-bid conference call on Wednesday, August 14, 2019, for any interested Bidders or potential Bidders. The conference call times are set in the following schedule for each of the four contiguous United States time zones. No pre-registration will be required. Recording of the conference call will be posted on the AEPA Website.

Voluntary Pre-Bid Conference Call Schedule (All Categories)

IFB	Eastern	Central	Mountain	Pacific
020-A Natural and Synthetic Surfaces for Sport Fields, Tracks, Courts, Playground and Landscaping Applications	11:00 AM	10:00 AM	9:00 AM	8:00 AM
020-B Carpet & Resilient Flooring	11:30 AM	10:30 AM	9:30 AM	8:30 AM
020-C Digital Resources & Instructional Materials	12:00 PM	11:00 AM	10:00 AM	9:00 AM
020-D Facility Management Software	12:30 PM	11:30 AM	10:30 AM	9:30 AM
020-E Lawn & Groundskeeping Equipment, Supplies & Services	1:00 PM	12:00 PM	11:00 AM	10:00 AM
020-F Digital Display Solutions	1:30 PM	12:30 PM	11:30 AM	10:30 AM
020-G Vehicles – Cars, SUVs, Crossovers, Light Duty Trucks, Vans, Police and Public Safety	2:00 PM	1:00 PM	12:00 PM	11:00 AM

Join Zoom Meeting: <https://zoom.us/j/770090798>

Conference Call Number: +1 929 436 2866

Meeting ID: 770 090 798

6. Standard Specifications

Item	Description
6.1	All charges and components necessary for performance of the contract shall be clearly identified even if such are not specifically addressed in any paragraph or sub-paragraph or form that is a part of this request.
6.2	If the Vendor Partner intends to utilize independent agents/distributors, subcontractors and/or third-party agents to perform and/or provide any part of the products and services offered herein, the Vendor Partner must identify all providers and any and all associated costs with these providers.
6.3	Optional services must be identified separately, and must include clear descriptions of proposed services.
6.4	Vendor Partners must provide a product or mix of products in a manner that will allow Buyers to migrate to emerging technologies/services and between legacy technologies with no penalty charge associated with maintaining the most appropriate selections of goods and services throughout the life of the contract.
6.5	All products sold by the Vendor Partner must be new. Only the newest versions of software and equipment will be bid. Older versions will only be sold, if specifically requested.
6.6	Products that have a 30/60/90 day money back guarantee will be clearly identified in the catalog and on the web site (if applicable).

7. Product | Category Specific Specifications

Item	Description
7.1	The Facility Management Software will be configured to allow remote non-maintenance personnel to request services, inventory or events from the district maintenance department (or other support personnel) through an Internet web browser.
7.2	The Facility Management Software will allow remote site requesters to be provided status updates on requests that have been previously submitted. This status update shall be filtered or password protected so that the requester only sees requests submitted by that individual.
7.3	The Facility Management Software should support email notifications that allow the maintenance (or other) department to automatically notify work order requestors when work is completed or when work is delayed.
7.4	Indicate additional hardware/software or network configuration requirements that are required to support this request/update feature. Indicate limitations on number of school site requesters that can be added to the system.
The following Modules/Functions are requested:	
7.5	Administration: <ul style="list-style-type: none"> - Power user with full access from single log-in; - Web access to administration; - Multi-level security; - Display of users functional permission level; - Help text and error messages; and - Multi-media file attachments (Word files, graphic images, audio and video) to record as work orders.
7.6	Work Order Management: <ul style="list-style-type: none"> - Database of support employees along with labor rate information; - Vendor database; - Ability to capture labor hours, contract cost and materials costs for each work order; - Recording of equipment downtime; - Ability to charge multiple wage rates; - Request dates and completion dates; - Estimated and actual hours;

Item	Description
	<ul style="list-style-type: none"> - User definable tracking fields; - Labor and materials transactions for each work order; - Work order tracking fields such as trade, purpose, budget and other codes; - Interface to check work order status with selection marks; - Search capability on work order number or description key; - Full integration with related modules including preventative maintenance, facility scheduling, inventory, building site request and asset management; - Automatic computation of work costs using labor rates in employee module; - Tracking tool for usage against work orders, required permitting, OEM manuals, photos, and safety documentation; - Ability to re-open closed work orders; - Ability to track/enter purchase orders; and - Ability to allow for multiple inspections per asset and store inspection results and data.
7.7	<p>Asset Management:</p> <ul style="list-style-type: none"> - List of values for assets, locations and classifications; - Standard equipment templates; - Warranty tracking; - Lists of outstanding jobs by equipment, asset class and location; - Lifetime labor and material costs per equipment, asset classification and location; - Historical tracking of total of maintenance costs per asset; - Predictive maintenance and cost analysis; and - Support asset tagging and scanning with mobile app.
7.8	<p>Materials Management:</p> <ul style="list-style-type: none"> - Manage inventory items by category types: mechanical, custodial, tools and others; - Track all inventory transactions, including issues, receipts, returns, adjustments, orders, and transfers; - Allow inventory to be issued to a location, pick list, project, work order or employee; - Enable requestor to select items from inventory catalogs and submit inventory requests online; - Enable users to request quotes for inventory items from multiple suppliers while re-ordering; - Track detailed information on inventory items including unit of issue, on contract, supplier, average fixed costs, tag number for tools, mark up and back-order quantity; - Allow inventory items to be stored and tracked in multiple pools and by crafts, including aisle, bin number and reorder points; - E-mail requestors automatically with inventory requests, receipts and updates of order status changes; - Integrate with the work order and preventative maintenance modules; and - Include ISO certified units of measure, pick list and optional parts inspection requirement per part.
7.9	<p>Technology Work Management:</p> <ul style="list-style-type: none"> - End users or IT staff may originate work order requests for IT problems; - Status of work orders can be customized and continually monitored by staff; - System routes request to proper technician using configurable work flow; - Provide for tracking of labor and parts for each incident; - Warranty of technology can be continually monitored; and - Provides extractable reports with ticket issues.
7.10	<p>Preventative Maintenance:</p> <ul style="list-style-type: none"> - Schedule by elapsed days, calendar date and usage; - View labor, material and tool cost for anticipated tasks;

Item	Description
	<ul style="list-style-type: none"> - Track all scheduled maintenance; - Create recurring maintenance schedules in a daily, weekly, monthly or annual basis; - Store schedule templates for quick creation of frequently used schedules; - Track equipment information, including manufacturer, model and serial numbers, in/out service dates and warranty; - Automatically generate preventative maintenance work orders through an integration with work order system; - Display incoming scheduled work in a calendar format, by staff member, for resource scheduling; and - Workload planner that allows you to combine schedules that are performed based on calendar time to reduce duplication of tasks.
7.11	<p>Budget Management:</p> <ul style="list-style-type: none"> - Allow district to establish budget code format; - Permit flexible budget terms and budget periods; - Provide for flexible budget hierarchies; - Analyze costs vs. budget per budget period and year-to-date; - Facilitate the creation of long-range capital plans and budget plans; and - Manage capital projects and expenditures related to deferred maintenance, deficiencies and corrections.
7.12	<p>Reports Generation:</p> <ul style="list-style-type: none"> - Graphs and tabular reports in multiple formats, like HTML, PDF, or Excel; - Search capability allowing user to define criteria in a specified field(s); - Reports on craft/trade, location, budget, employee, craft cost analysis, transactions, outstanding work, work load and assignments, and status of work; - Standard inventory reports on issued inventory, returned inventory, transferred inventory, supplier reports, and pick list reports; - Standard preventative maintenance (PM) reports on projected parts and supplies, estimated PM labor, forecasting labor, and corrective vs. preventative; - Standard facility scheduling reports on location, organization, schedules, budget, invoices, and reminders; - Standard utility reports on cost per square foot, use by building comparison, cost by building comparison, use/square foot by building, cost/square foot by building, energy savings report, and load factor report; - FEMA related reporting; and - Access to reporting tool that allows for peer to peer comparisons.
7.13	<p>Utility Management:</p> <ul style="list-style-type: none"> - Support all standard energy/water related utilities with addition of up to two custom types; - Track essential account, vendor building and user information; - Track basic utility billing determinants for each account and/or meter including billing periods, consumption, cost and average unit cost. Bills are to be tracked by month, year and building; - Ability to track user-defined data such as hours of use, number of occupants, etc.; - Use and cost budget function for monthly and annual budget analysis; - Customizable user-defined advanced utility bill determinants including power factor, time-of-use, taxes, service charges and deregulated bill determinants; - Current versus baseline comparisons including application of weather normalization for more accurate comparison of utility data from year to year; - Easy exporting of data to any spreadsheet format; - Virtual and sub-meter tracking to support internal organization chargeback

Item	Description
	requirements; - Utility bill validity checking with multiple parameter analysis; - Ability to create customized user types and roles; - Allows you to scan and store electronic copies of utility bills; - Track capital projects related to energy conservation; - Track Energy Star Integration for ratings; - Track Interval Meter Data; and - Create shutdown checklists.
7.14	Facility Scheduling: - Multiple routing rules for event approval; - Automatically routes usage requests to approval managers; - Track facility usage costs and automatically generate invoices; - Enable event requesters to check facility availability and submit usage requests online; - Display scheduled events on calendar; - Email notifications to support personnel; - Database of areas available for after-hour usage; - Ability to handle events with multiple dates with a repeating pattern as well as random series of events; - Billing and rental administration; and - Multiple levels of security.
7.15	Wireless/Mobile Management that enables mobile workers to: - Receive, process and complete work via a wireless/mobile device; - Record transactions for labors hours; - Search and sort, and sort through their work orders; - execute tasks in offline mode (connected and disconnected editing); - Barcode and QR scanning; - Map-based service requests and work order generation; - attach/store images and photos to asset/work order; and - Record work order labor hours.
7.16	Trip Planning and Management: - Allow requesters to easily submit trip requests and check status online; - Automatically route trip requests to approval managers; - Track availability and manage scheduling of vehicles and drivers; - Display scheduled trips on interactive calendar; and - Track all trip related costs.
7.17	Information Technology Asset Management: - Gather and report information about computer assets on your network, including hardware, software and warranties; - Manage all computer assets across multiple platforms (Chromebooks, Windows, Macintosh, Unix, Linux, Novell, etc.); - Monitor assets at the component level and generates alerts for missing assets; - Track licenses and usage for optimum license management and compliance; - Generate alerts for software license agreement violations and unauthorized software installations; and - Track non-network devices.
7.18	Additional educational modules may be added.
7.19	Many, but not all, AEPA members also serve municipalities. Insert information on any municipal-related modules available in your response.

8. Technical Requirements and Documentation

The information requested below will be used by AEPA to substantiate compliance with the requirements of this solicitation. Vendors are strongly encouraged to provide complete and accurate information. Include your responses and upload with Part D – Questionnaire.

Item	Description
8.1	Indicate if the proposed Facility Management Software utilizes an Application Service Provider (ASP) and/or local server based platform for hosting, administering, and using your product.
8.2	Provide minimum hardware requirements for the local server and computer workstations required to use your product. Include requirements for both ASP and/or local server scenarios.
8.3	Provide a listing of server software operating systems your product is compatible with; include minimum version needed to properly run your product.
8.4	Provide a listing of workstation software operating systems your product is compatible with, include minimum version needed to properly run your product.
8.5	Provide a listing of application software, including web browsers that are required to operate your program.
8.6	Provide an implementation schedule, including tasks, resources, durations and dependencies after award of a contract.
8.7	The technology infrastructure enabling the solution must provide for industry-standard 99.99% uptime. Exceptions to this requirement include downtime during regularly scheduled and maintenance periods. Vendor should also define a communication plan to clarify the timing of maintenance downtime periods so end users and administration have ample time to prepare for the temporary unavailability of the vendor's system.
8.8	Indicate additional hardware/software or network configuration requirements that are required to support this system and will contribute the total cost of ownership. Indicate limitations on number of site requesters that can be added to the system.

9. Functionality

Item	Description
9.1	Provide a listing of modules for your product and what specifications from Section 5 are included in each.
9.2	Indicate how often upgrades are made to the system, including the testing processes used before implementation of an upgrade.
9.3	Describe the reporting capabilities available to the customer. Provide sample copies.
9.4	Indicate how long 'history' records are maintained for use by the customer.
9.5	Describe the system's security capabilities and the privacy protection available to customers.
9.6	Provide website information to include administrative access to the site. Include instructions and screen shots for navigating the various site tools.
9.7	Vendor must provide guidance on, support for, and pricing (if additional) for data-migration services to enable customers to move from legacy ticketing systems to the vendor's solution.
9.8	Describe your company's warranty policy for your product.
9.9	Provide the estimated cost of major upgrades over the past three years.
9.10	Provide the estimated hours per year spent performing data administration and backups.
9.11	Describe if this software will address FEMA reporting, procedures-protocol, and data collection for parts, equipment and support.

Item	Description
9.12	Indicate if cloud computing is an option with the proposed system.
9.13	Software must support data collection and retention that is in line with FEMA reporting procedures/protocol in case of a FEMA disaster.

10. Training, Support, and Additional Services Available

Item	Description
10.1	Describe any training services available to customers. This should include the 'standard' package for startup and training of clients including system installation and training for system administrators and all system users. Include samples.
10.2	List any additional training services and costs available to customers.
10.3	List any available update and support contracts, including policy and frequency, for your program.
10.4	Describe your return policies for instances where a customer buys your program and determines that it does not meet their requirements. Include policies for monetary refund, timeframe, and any associated limitations.
10.5	Submit a preliminary plan on how you would help the AEPA rollout this program to the AEPA member organizations and their affiliated educational institutions.
10.6	Include information on any additional services you will provide through this contract if awarded.

11. Pricing

AEPA has identified and stipulated the type of bid and the pricing methodologies that are to be utilized to price and submit bid prices. The Vendor Partner agrees that the cost for any item bid or offered on this contract will be uniform for all states, and that any differences in pricing are due to state specific installation and labor costs, AEPA Member Agency's Administrative Fee, or other approved reasons. The Bidder must provide their pricing as requested utilizing the various pricing methodologies specified. **The Bidder/Vendor Partner must agree that they will offer prices equal to or better than what they ordinarily offer to individual entities or cooperatives with equal or lesser volume.** Please note the following that relate to pricing:

1. **Primary Pricing Strategies:** All Bidders will be required to submit "Primary Pricing" in the form of either "Catalog Pricing" or "Line-Item Pricing" or a combination of these two pricing strategies as defined in Part B, bid specifications. Bidders are also encouraged to offer OPTIONAL pricing strategies including "Hot List" and "Volume Discounts".
 - a. **Catalog Pricing:** Catalog pricing is utilized when the products and/or services solicited are clearly identified with set and specific characteristics, attributes and configurations that are identifiable as a stand-alone single unit and can be listed and priced as a single unit with options that can be added to enhance and/or improve its operation and functionality. The Bidder offers a fixed discount(s) off retail price, catalog price, published price or list price. The discounts may be for the entire commercially available catalog, for specific products, product lines, manufacturers or category of products as determined by the Bidder.
 - i. **Discounts:** Discount offers must clearly identify percent of discount to apply to a commercially available catalog, manufacturer, MSRP, retail or nationally published price lists. Bidders shall identify and stipulate if the discounts apply to the entire catalog/price list, specific product lines, manufacturers and/or categories of products. Bidder shall agree that there will be no reduction in discount(s) during the term of the contract.
 - ii. **New Catalogs/Price Changes:** New catalogs and corresponding nationally published price lists may be submitted throughout the term of the contract and shall be submitted to the

AEPA Category Committee for review prior to release to all AEPA Member Agencies. Prices may change based on manufacturer's price changes, new published pricing or price lists, but the original discount bid shall remain firm for the duration of the contract.

- iii. **Product Addition/Discontinuation:** New products, within the same scope of work, may be added at the established percentage discounts at any time. Discontinued products may be dropped at any time during the year. In the event a Core item is discontinued by the manufacturer during the term of the contract, Vendor Partner is required to add a functionally equivalent substitute at the same discount structure.

2. Part F - Pricing Workbook

- a. Pricing shall be completed on the provided pricing sheets (Microsoft Excel Workbook) with the individual tables to be completed as follows:
 - F.1 – Catalog Discount (Required)
 - F.2 –Price Schedule (Required)
 - F.3 – Services Price Schedule (Required)
 - F.4 – Volume Discounts (Optional)
- c. Pricing evaluation may include other considerations, including the total cost of the acquisition and whether the Proposer's offering represents the best value. See Evaluation, Approval and Award in Part A – Terms and Conditions for additional information.

12. Evaluation

The AEPA Committee for this category will evaluate bid responses based on the entire response, and according to the criteria detailed in Part A for AEPA's definition of Responsive and Responsible bids. A recommendation may be made to recommend a single response, or to recommend multiple bidders based on differentiation of product or service between bidders. AEPA will vote as a whole to accept or not accept a committee's recommendation. Once accepted, each recommended bid response will go to the individual states for contract approval. Please note, pricing evaluation may include other considerations, including the total cost of the acquisition and whether the Proposer's offering represents the best value. The evaluation committee may consider such factors as life-cycle costs, total cost of ownership, quality, and the suitability of an offering in meeting AEPA members' needs.

Below is a summary taken from the Evaluation section in Part A, F. Bid Evaluation, Approval and Award:

Evaluation Criteria
Cost Evaluation
Complete Response to Bid
Conformance to Bid Terms and Conditions
Pricing Equal to or Better Than That Offered to Individual Entities or Cooperatives With Equal or Lesser Volume
Quality and Suitability of Products Offered
Marketing Plan
Financial Viability
Demonstrated Track Record of Performance in the Public Marketplace
Value Added attributes