

# Invitation for Bid AEPA #024-D

# **CMMS SOFTWARE** COMPUTERIZED MAINTENANCE MANAGEMENT SYSTEM

# **Part B – Technical Specifications**

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#### 1. Scope of Bid

AEPA is seeking qualified, experienced contractor(s) who possess the necessary resources and capabilities to acquire, deliver and perform the required supplies, materials equipment and labor to all participating member states (up to 29) in the category of CMMS.

- 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-architecture 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, and any related expenses necessary to implement the product as described herein.
- d. Make the software operational on existing Buyer computer and network equipment or Software as a Service (SAAS). 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; 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 the latest design and technology and from the most current and popular 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 the needs of our customer base.

#### 2. Type of Bid

AEPA requests Bidders to submit <u>primary</u> 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."

T mis bia					
YES	NO	TYPE OF BID			
X		<b>CATALOG:</b> 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.			
	X	<b>LINE ITEM:</b> 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, it is 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.			

#### This bid is considered a:

#### 3. Anticipated AEPA Member Agency Participation

State	Participate?	Other States Member Sells In
California	Yes	AZ, NV
Colorado	Yes	
Connecticut	Yes	ME, NH, NY, RI, VT
Florida	Yes	AL
Georgia	Yes	
Illinois	Yes	
Indiana	Yes	
Iowa	Yes	SD
Kansas	Yes	ОК
Kentucky	Yes	AL, LA, MS, NC, TN
Massachusetts	Yes	
Michigan	No	
Minnesota	Yes	SD
Missouri	Yes	AR, LA, SD
Montana	Yes	ID
Nebraska	Yes	
New Jersey	Yes	
New Mexico	Yes	
North Dakota	Yes	
Ohio	Yes	
Oregon	Yes	
Pennsylvania	Yes	DE, HI, MD, NY
South Carolina	Yes	NC
Texas	Yes	
Virginia	Undecided	

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Washington	Yes	AK, ID
West Virginia	Undecided	
Wisconsin	Yes	
Wyoming	Yes	SD,UT

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 any 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

CMMS is a currently held category for AEPA, currently titled Facility Management Software. The resulting bid will be an Indefinite Delivery, Indefinite Quantity (IDIQ) contract(s). AEPA Member Agencies estimate approximately \$9,300,000 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. 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 – August 17, 2023

AEPA will host a voluntary pre-bid conference call, 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.

Category	Eastern	Central	Mountain	Pacific
024-B Electric Vehicle Charging	10:00 AM	9:00 AM	8:00 AM	7:00 AM
024-C Digital Resources & Instructional Materials	10:30 AM	9:30 AM	8:30 AM	7:30 AM
024-D Computerized Maintenance Management System	11:00 AM	10:00 AM	9:00 AM	8:00 AM
024-E Lawn & Groundskeeping Equipment, Supplies, & Services	11:30 AM	10:30 AM	9:30 AM	8:30 AM
024-F Digital Display Solutions	12:00 PM	11:00 AM	10:00 AM	9:00 AM
024-H Audio Visual Integration, Equipment, and Installation	1:00 PM	12:00 PM	11:00 AM	10:00 AM
024-G Vehicles – Cars, SUVs, Light Duty Trucks/Vans, Emergency, Fuel, Hybrid, Electric	1:30 PM	12:30 PM	11:30 AM	10:30 AM
024-A Natural & Synthetic Surfaces for Sports Fields, Tracks, Courts, Playground & Landscaping Applications	2:00 PM	1:00 PM	12:00 PM	11:00 AM

# Voluntary Pre-Bid Conference Call Schedule (All Categories) – August 17, 2023

# **Conference Call Number/Online Connection:**

https://us02web.zoom.us/j/85105482270?pwd=VElaSG15WVAyelQyWFgxZEpWM2UyQT09

**Meeting ID**: 851 0548 2270 **Passcode:** B3C5yU

**Dial In Information:** 1 305 224 1968 **Meeting ID:** 851 0548 2270 **Passcode:** 548099

#### 6. General Specifications

Item	Description
6.1	Vendor Partners must be a manufacturer's authorized sales and service dealer for all proposed equipment/software. An authorized sales and service dealer is defined in this solicitation as one purchasing their products for resell directly from the manufacturer(s) or the manufacturer's approved channels. Products that result from new authorized sales and service dealer arrangements between the Vendor Partner and the manufacturer during the term of this contract may be added and offered through the AEPA contract.
6.2	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.
6.3	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.
6.4	Optional services must be identified separately, and must include clear descriptions of proposed services.
6.5	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.
6.6	Only the newest versions of software and equipment will be bid. Older versions will only be sold, if specifically requested.
6.7	Products that have a 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 CMMS system 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 a web browser.
7.2	The CMMS system 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 CMMS system 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 site requesters that can be added to the system.

The following	ng <b>Modules/Functions</b> are requested:	
(Note: Interoperability is not required for all system components.)		
7.5	Administration:	
	- Power user with full access from single log-in;	
	- Web access to administration;	
	- Multi-level security;	
	- Display of user's 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.	
	- Secure and/or Multi Factor Authentication capabilities	
7.6	Work Order Management:	
	- 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;	
	- 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;	
	<ul> <li>Tracking tool for usage against work orders, required permitting, OEM manuals, photos, and safety documentation;</li> </ul>	
	<ul> <li>Ability to re-open closed work orders;</li> </ul>	
	<ul> <li>Ability to track/enter purchase orders; and</li> </ul>	
	<ul> <li>Ability to allow for multiple inspections per asset and store inspection results and data.</li> </ul>	
7.7	Asset Management:	
	<ul> <li>List of values for assets, locations and classifications;</li> </ul>	
	- 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	Materials Management:
	- 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;
	- 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;
	<ul> <li>Allow inventory items to be stored and tracked in multiple pools and by categories including aisle, bin number and reorder points; and</li> </ul>
	<ul> <li>Integrate with the work order and preventative maintenance modules.</li> </ul>
	- integrate with the work of der and preventative maintenance modules.
7.9	Technology Work Management:
	- 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 workflow;
	- Provide for tracking of labor and parts for each incident; and
	- Warranty of technology can be continually monitored.
7.10	Preventative Maintenance:
	- Schedule by elapsed days, calendar date and usage;
	- View labor, material and tool cost for anticipated tasks;
	- 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; and
	- Display incoming scheduled work in a calendar format, by staff member, for resource
	scheduling.
7.11	Budget Management:
	- Allow district to establish budget code format;
	- Permit flexible budget terms, budget periods, and 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
	<ul> <li>Manage capital projects and expenditures related to deferred maintenance,</li> </ul>
	deficiencies and corrections.

7.12	Reports Generation:
	- Graphs and tabular reports in multiple formats, like HTML, PDF, or Excel;
	- Search capability allowing user to define criteria in a specified field(s);
	<ul> <li>Reports on craft/trade, location, budget, employee, cost analysis, transactions, outstanding work, workload and assignments, and status of work;</li> </ul>
	<ul> <li>Standard inventory reports on issued inventory, returned inventory, transferred inventory, supplier reports, and pick list reports;</li> </ul>
	<ul> <li>Standard preventative maintenance (PM) reports on projected parts and supplies, estimated PM labor, forecasting labor, and corrective vs. preventative;</li> </ul>
	<ul> <li>Standard facility scheduling reports on location, organization, schedules, budget, invoices, and reminders;</li> </ul>
	- FEMA related reporting; and
	- Access to reporting tool that allows for peer-to-peer comparisons.
7.13	Utility Management: OPTIONAL
	- Support all standard energy/water/other related utilities;
	- Track essential account, vendor building and user information;
	<ul> <li>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;</li> </ul>
	- 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;
	<ul> <li>Current versus baseline comparisons including application of weather normalization for more accurate comparison of utility data from year to year;</li> </ul>
	<ul> <li>Easy exporting of data to any spreadsheet format;</li> </ul>
	- Virtual and sub-meter tracking to support internal organization chargeback
	requirements;
	<ul> <li>Utility bill validity checking with multiple parameter analysis;</li> </ul>
	- Allows you to scan and store electronic copies of utility bills;
	- Optional:
	- 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: OPTIONAL
	- Multiple routing rules for event approval;
	<ul> <li>Automatically routes usage requests to approval managers;</li> </ul>
	<ul> <li>Track facility usage costs and automatically generate invoices;</li> </ul>
	<ul> <li>Enable event requesters to check facility availability and submit usage requests online;</li> </ul>
	- Display scheduled events on calendar;
	- Email notifications to support personnel;
	- Database of areas available for after-hour usage;
	<ul> <li>Ability to handle events with multiple dates with a repeating pattern as well as random series of events;</li> </ul>
	- Billing and rental administration; and
	- Multiple levels of security.
7.15	Wireless/Mobile Management that enables mobile workers to: OPTIONAL
	- Receive, process and complete work via a wireless/mobile device;
	- Record transactions for labors hours;
	- Search and sort, and sort through their work orders;
	- Barcode and QR scanning;
	- attach/store images and photos to asset/work order; and
	- Record work order labor hours.
7.16	Trip Planning and Management: OPTIONAL
	- Allow requesters to easily submit trip requests and check status online;
	<ul> <li>Automatically route trip requests to approval managers;</li> </ul>
	- 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: OPTIONAL
	<ul> <li>Gather and report information about computer assets on your network, including hardware, software and warranties;</li> </ul>
	<ul> <li>Monitor assets at the component level and generates alerts for missing assets;</li> </ul>
	- Track licenses and usage for optimum license management and compliance; and
	<ul> <li>Generate alerts for software license agreement violations and unauthorized software installations.</li> </ul>
7.18	Additional 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. <u>Include your responses and upload with as a single, scanned PDF labeled</u> Part B, 8.1-8.8 Technical Requirements and Documentation (see bid checklist in Part E, page 8).

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. 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. **Core List:** In a Catalog Priced bid, a category (i.e. office supplies) may include a "core list" which contains a selection of the most commonly used products/services with the expectation that a deeper discount would be bid for these items. If a new catalog and price list is published during the contract term, the original discounts shall be applied to the new published prices to establish the AEPA price for these core items.
- iv. **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.
- b. **Volume Price Discounts:** Bidders are encouraged to offer additional pricing discounts that may be offered for a group of agencies in a local geographic area that desire to combine requirements (one time purchase, or annual spend), i.e. local city, county, school district(s), etc. and/or for large one time purchases. Additional volume price discounts are permissible under the following conditions: Discounts should be tiered and based on spend ranges as established by the Bidder on the Pricing Forms. Volume determination shall be determined between the Vendor Partner and the individual Buyers on a case-by-case basis. All additional discounts are to be offered equally to all AEPA Member Agencies and Participating Entities and be based on the Volume Price Discounts originally bid providing the same or similar volume commitment, specific needs, terms and conditions, a similar time frame, seasonal considerations and provided the same manufacturer support is available to the Vendor Partner.

#### 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 Discounts (Required)
  - F.2 Price Schedule (Required)
  - F.3 Services Price Schedule (Optional)
  - F.4 Volume Discounts (Optional)
- b. Pricing evaluation may include considerations, other than product cost, 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.

#### **10. 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.

As a part of the process of determining responsible respondents, the category committee may request reports that describe the financial soundness of your organization. You may be asked to include a third-party report or reports that demonstrate your firm's strength. Accepted financial reports may include balance sheets and Profit & Loss statements for the past three years, a Letter of Credit or Line of Credit from a bank or lending institution indicating the line of credit limit and the average outstanding balance, Dun & Bradstreet reports, a complete Annual Financial Report (for publicly traded companies).

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: a

Eval	uation	Criteri
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**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