



December 16, 2019

TO:

RE: Request for Proposal – Computerized Maintenance Management System  
The University of Alabama in Huntsville  
**Proposal No. P00222**

The University of Alabama in Huntsville is requesting proposals to secure a vendor to provide a Computerized Maintenance Management System for University Facilities and Operations.

In the event it becomes necessary to revise any part of this Request for Proposal prior to the assigned return date, revisions will be posted in writing on the Vendor Registry website. The University will be the sole determinant of whether any revisions/addenda should be issued as a result of any questions or other matters, and will extend the proposal deadline if such information significantly amends this solicitation or makes compliance with the original proposal due date impractical.

In order to be considered for selection, vendors must submit a complete response to this request for proposal. The vendors shall make no other distribution of the proposals except electronically to [vendorregistry.com](http://vendorregistry.com).

All proposals must be submitted on Vendor Registry (Vendorregistry.com.) No proposals will be accepted by regular mail, UPS, FedEx, and Email or delivered in person. If you submit any other way than online at vendorregistry.com your bid will not be accepted.

In order to be considered for selection, vendors must submit a complete response to this request for proposal on vendorregistry.com.

No proposal may be amended or withdrawn after the scheduled closing time of receipt for a period of sixty (60) days. The University reserves the right to waive any informality and to reject any and all proposals.

All questions pertaining to this Request for Proposal should be addressed to Kelly Haas via email: [kelly.haas@uah.edu](mailto:kelly.haas@uah.edu), (Subject: Executive Search Services Proposal P00222) or by phone: 256-824-6492.

Sincerely,

*Kelly Haas*

Kelly Haas, Procurement Officer II  
Procurement & Business Services

**REQUEST FOR PROPOSALS AND SPECIFICATIONS**

**FOR THE**

**Computerized Maintenance Management System**

**THE UNIVERSITY OF ALABAMA IN HUNTSVILLE**

**HUNTSVILLE, ALABAMA 35899**

**PROPOSALS TO BE SUBMITTED ON VENDORREGISTRY.COM  
NO PROPOSALS WILL BE ACCEPTED BY REGULAR MAIL, UPS,  
FEDEX, EMAIL OR DELIVERED IN PERSON  
IF YOU SUBMIT ANY OTHER WAY THAN ONLINE AT  
VENDORREGISTRY  
YOUR BID WILL NOT BE ACCEPTED**

**PROCUREMENT SERVICES  
THE UNIVERSITY OF ALABAMA IN HUNTSVILLE  
HUNTSVILLE, ALABAMA 35899**

**(256) 824-6492**

THE UNIVERSITY OF ALABAMA IN HUNTSVILLE  
 REQUEST FOR PROPOSALS AND SPECIFICATIONS  
 FOR THE OPERATION OF THE UNIVERSITY FOOD SERVICE

**TABLE OF CONTENTS**

<b>1.0</b>	<b>GENERAL</b>	4
1.1	DESCRIPTION	4
1.2	BACKGROUND	5
1.3	PROSPECTIVE CMMS PROVIDER QUALIFICATIONS	5
1.4	SYSTEM REQUIREMENTS	5
1.5	DATA SECURITY & AVAILABILITY	5
1.6	SERVICE AND SUPPORT	6
1.7	FUNCTIONAL REQUIREMENTS	7
1.8	GENERAL FUNCTIONS	7
1.9	LOCATION/ASSET INFORMATION	7
1.10	SUBMIT SERVICE REQUESTS (SR)	8
1.11	CREATE WORK ORDERS	9
1.12	JOB PLANS	10
1.13	PREVENTATIVE MAINTENANCE	10
1.14	WORKFLOW MANAGEMENT	11
1.15	WORK ORDER MANAGEMENT	11
1.16	MOBILE APPLICATION	13
1.17	CAPITOL REPLACEMENT PLANNING	13
1.18	CONTRACT MANAGEMENT	14
1.19	CONTRACT/VENDOR MANAGEMENT	14
1.20	CUSTOMER SURVEY	14
1.21	INVENTORY PARTS MANAGEMENT	15
1.22	PURCHASING	15
1.23	LEASE MANAGEMENT (PREFERRED BUT NOT REQUIRED)	15
1.24	PROJECT MANAGEMENT	16
1.25	DOCUMENT MANAGEMENT	16
1.26	UTILITY MANAGEMENT (PREFERRED BUT NOT REQUIRED)	16
1.27	SPACE PLANNING (PREFERRED BUT NOT REQUIRED)	17
1.28	MOVE MANAGEMENT (PREFERRED BUT NOT REQUIRED)	17
1.29	KEY MANAGEMENT (PREFERRED BUT NOT REQUIRED)	17
1.30	TRAINING MANAGEMENT (PREFERRED BUT NOT REQUIRED)	17
1.31	TIME SHEETS	18
1.32	INSPECTIONS	18
1.33	USER INTERFACE	18
1.34	REPORTS AND DASH BOARD	19
1.35	DATA INTEGRATION	20
1.36	USER ADMINISTRATION	20
<b>2.0</b>	<b>RESPONSE FORMAT</b>	21
2.1	SUBMISSION REQUIREMENT	21
2.2	QUALIFICATION REQUIREMENT	21
2.3	SOFTWARE PRICING	22
2.4	ADDITIONAL NOTES/COMMENTS	23

2.5	SELECTION PROCESS .....	24
2.6	BIDDER SELECTION .....	24
3.0	<b>COST PROPOSAL .....</b>	<b>25</b>
4.0	<b>EXECUTION OF PROPOSAL.....</b>	<b>26</b>
5.0	<b>GENERAL INFORMATION.....</b>	<b>27</b>
5.1	TIME FOR ACCEPTANCE .....	27
5.2	VENDOR REPRESENTATION .....	27
6.0	<b>CONTRACT TERMS AND CONDITIONS .....</b>	<b>27</b>
6.1	GOVERNING LAW .....	27
6.2	SITUS.....	27
6.3	STANDARD OF PERFORMANCE .....	27
6.4	INTEREST OF VENDOR.....	27
6.5	KEY PERSONEL .....	27
6.6	FORCE MAJEURE .....	27
6.7	TERMINATION .....	28
6.8	ADDITIONAL TERMINATION RIGHTS .....	28
6.9	CONDUCT ON PREMISES .....	28
6.10	AVAILABLITY OF FUNDS .....	29
6.11	ASSIGNMENT .....	29
6.12	COMPLAINCE WITH LAW.....	29
6.13	NONDISCRIMINATION .....	29
6.14	INSURANCE .....	30
6.15	UNIVERSITY NAME/LIMITATION OF USE.....	30
6.16	ENTIRE AGREEMENT.....	30
6.17	AMENDMENT .....	31
7.0	VENDOR FORM .....	32
8.0	STATE OF ALABAMA IMMIGRTION LAW .....	33-34
9.0	VENDOR DISCLOSURE STATEMENT.....	35-37

## **COMPUTERIZED MAINTENANCE MANAGEMENT SYSTEM SPECIFICATION**

### **PART 1 - GENERAL**

#### **1.1 DESCRIPTION**

The University of Alabama in Huntsville, UAH (OWNER) desires to select a computerized maintenance management system (CMMS) to assist with the operations, maintenance, and management of their Huntsville, Alabama campus and related facilities & services.

In short, the software provider will deliver the following:

Cloud-based, software-as-a-service (SaaS)

System training

On-going support for duration of contract

Implementation support services

Partner with Owner's CMMS Consultant to implement, train, and establish best practices

## **1.2 BACKGROUND**

UAH is a public university located in Huntsville, Alabama that has nearly 10,000 students located on just over 500 acres with approximately 3.5 million square feet.

UAH is a research-intensive, internationally recognized technological university serving Alabama and beyond. Their mission is to explore, discover, create, and communicate knowledge, while educating individuals in leadership, innovation, critical thinking, and civic responsibility and inspiring a passion for learning

UAH is part of the University of Alabama System, which is Alabama's largest higher education enterprise, comprised of three dynamic institutions striving to provide the people of Alabama with regionally and nationally prominent teaching, research, and service programs with a profound impact on the state.

UAH's Facilities & Operations Department looks to leverage the benefits of a modern-day computer platform as it migrates away from DataStream's MP2

## **1.3 PROSPECTIVE CMMS PROVIDER QUALIFICATIONS**

Minimum five years providing maintenance management software

Client renewal rate of at least 95%

Minimum of five hundred (500) current, active clients

## **1.4 SYSTEM REQUIREMENTS**

Cloud-based, software-as-a-service (SaaS)

Web access compatible with:

Microsoft Internet Explorer (version 11 and higher)

Microsoft Edge (version 44 and higher)

Google Chrome (version 77 and higher)

Mozilla Firefox (version 40 and higher)

Mobile application compatible with:

Android 8.0 and higher

Apple iOS 12 and higher

Windows Mobile 10

## **1.5 DATA SECURITY & AVAILABILITY**

Data is encrypted in transit

Encrypted at rest (Preferred)

Data resides in a secured data center

Preferred cloud hosting with resilient providers, such as Amazon Web Services or Google

Minimum 99.7% uptime; 99.9% is preferred

Database backed up at least daily

Proof that backups are tested

Data owned by OWNER and available at any time in an Excel-compatible format

User Security

Unique User ID

Require password that meets the following:

Password reset requirement after specified number of days (Owner configurable)

Combination of upper and lower-case and special character (Preferred)

Single Sign-On Authentication capability

Supports CAS, Central Authentication Service

Supports Shibboleth

FERPA Compliant

Family Educational Rights and Privacy Act (FERPA) (20 U.S.C. § 1232g; 34 CFR Part 99) is a Federal law that protects the privacy of student education records

UAH does not anticipate maintaining student information in the CMMS, other than potentially contact information, as a service requester

## **1.6 SERVICE & SUPPORT**

Provide training

Robust online tutorials and intuitive instructions

Assist with bulk importing of data during implementation

Technical support during business hours (7AM to 5PM Central Time)

Support available via phone, e-mail, and online chat

Average support response times meet the below requirements:

Less than four-hour response for normal/low-priority tickets

Less than one-hour response for high-priority/critical tickets

## **1.7 FUNCTIONAL REQUIREMENTS**

System will provide the minimum REQUIRED functions, unless otherwise indicated. System should provide functionality “out-of-the-box” without work-around. Shortcomings of SYSTEM should be addressed in proposal response.

## **1.8 GENERAL FUNCTIONS**

Accommodate 3-D (e.g. QR) bar codes

Web interface should accommodate OWNER logo and style guidelines

OWNER configurable user-defined fields available in all modules/forms

UDFs are available for queries and reports

Global search capability in all modules

“Wild card” character (e.g. %) available to assist with searching

Ability to integrate with UAH’s building controls system, which employs Johnson Controls

Automatically create work order from alarm generated in building controls system

Ability to integrate with Banner Financial System

CAD and/or REVIT Viewer (preferred, but not required)

## **1.9 LOCATION/ASSET INFORMATION**

Parent/Child hierarchy with at least three levels

Unlimited levels (preferred, but not required)

Location hierarchy (assets/equipment shown via relative location hierarchy)

Associate asset/equipment with location

Ability to add/modify user-defined fields to capture asset attributes

Copy/Duplicate assets to create new

Paste with Find & Replace function

Accommodate hyperlink to web address or shared file location for referenced documents, files, etc.

Attach images and files to asset/location

Ability to “retire” assets without deleting them or their history from the database

Minimum required fields for asset information:

Unique equipment ID (alphanumeric)

Asset/equipment description

Location ID (alphanumeric)

Location description

Criticality/Priority Level (OWNER definable)

Owner

Department

System Type dropdown list (OWNER definable)

Date installed

Manufacturer

Model and serial numbers

Warranty end date

Alerts user that equipment is under warranty when the Work Order (WO) initiated

Installation/Replacement cost

Capacity/Size

Parts list

Link to inventory

Life expectancy in years or months (can be a user-defined field)

Asset condition (can be a user-defined field)

Hazards (e.g. asbestos, confined space, etc.)

Aggregate and track asset lifecycle costs

Track fleet vehicles and related maintenance, costs, etc.

Associate/list asset parts, such as belts, filters, lubricant, etc.

Associate/link parent and child assets

View Work Order history for Asset/Location

Associate and trend meter data for assets/locations

Establish alarm thresholds or triggers for meters that creates follow-up work orders

### **1.10 SUBMIT SERVICE REQUESTS (SR)**

Submit via web interface with username and password

Submit via web interface as a general user – no username or password required

Requester provides their contact information with service request

Ability to submit service request via:



Text

E-mail

QR (3-D) code

Provide custom link or “button” to service request form

Link/button can be sent out via e-mail or put on Maintenance Department website

Minimum fields available on submission form:

Requester (auto-populate if user is logged in)

Requester contact information (auto-populate if user is logged in)

Service type dropdown list (OWNER definable)

Service Location (dropdown list and free text)

Requested completion date & time

Request description (free text)

Priority dropdown list (OWNER definable)

Ability to select which fields are visible

Ability to select which fields are required

Acknowledgement of SR submission to Requester

Auto-notification to Requester of SR approval, scheduling, and completion

Notifications, including text, are OWNER configurable

Requester receives customer survey upon completion of WO

Ability to attach file to SR with submission (preferred, but not required)

Auto date/timestamp of submission

Duplicate WO/request confirmation

Communicate with Requester to coordinate access and solicit more information

Route requests back to Requester for approval

## **1.11 CREATE WORK ORDERS**

Staff can create work orders (WO) via web interface and mobile application

Create child(ren) WO under parent WO

Option to generate follow-up WO(s) on failed task(s)

Select WO Priority from dropdown list (OWNER definable)

Includes various Work Order (WO) types (e.g. PM, CM, EM, etc.)

OWNER definable

Select OWNER configurable problem code

Duplicate WO confirmation

### **1.12 JOB PLANS**

Unlimited number tasks associated with Job Plan

Duplicate/copy to create new Job Plan(s)

Estimate duration

Identify required parts and tools

List safety hazards and necessary Personal Protective Equipment (PPE)

Identify required trade or skill sets for Job Plan (preferred, but not required)

### **1.13 PREVENTIVE MAINTENANCE**

Create & schedule Preventive Maintenance (PM) work order

Assign PM to asset (location or equipment)

Select PM frequency

Assign WO priority at PM level

Automatically sets WO priority when WO is generated

Assign to Department (select from dropdown list)

Assign to specific skill/trade (select from dropdown list)

Ability to assign to Contractor

Nest work orders or tasks (e.g. semi-annual PM supersedes quarterly PM)

Generate PM work orders based upon calendar (e.g. monthly, quarterly, etc.) or run-time (e.g. run-hours)

Assign parts to PM work orders

Pull parts and deduct from inventory

Auto-notify, if needed parts are not available

Ability to generate PM labor and material forecast report

Create follow-up work orders for failed tasks

Option for one-to-one ratio (one work order per failed task) (preferred, but not required)

Options for many-to-one ratio (one work order for all failed task) (preferred, but not required)

#### **1.14 WORKFLOW MANAGEMENT**

OWNER should have capability to create/configure workflows and notifications, including the below functionalities

Auto-assign SRs to staff, trade, or department based upon:

- Service Type selected

- Location

Route/assign Work Orders based upon:

- Shop

- Zone

- Problem/Failure/Reason Code

- Priority

Ability to route WOs to Contractor(s)

Staff/contractor notified when assigned WO via:

- E-mail

- Text

Ability to route WOs for approval (e.g. supervisor, financial, purchasing, etc.)

Automated alerts and notifications based upon saved criteria

Work Order Sub status (OWNER configurable) can route or escalate

#### **1.15 WORK ORDER MANAGEMENT**

Calendar View

- Provide calendar view of work orders

- User selectable layout (day, week, and month)

- Calendar integrates with common calendar applications, such as Microsoft Outlook and Google Calendar

Allow for batch WO processing (e.g. completing, closing, etc.)

- Current, open work orders

- Forecasted work orders

Route notification of new SR or WO to predetermined recipients based on service type

Ability to assign WO to Contractor

Automatically notify Contractor of assigned WO

Track correspondence with Contractor against respective WO in system

Allow for inspection checklists

Checklists can be saved and scheduled similar to (or as) PMs

Checklists can be completed via mobile device

Option to generate child work order(s) for failed task(s)/inspection

Work Order Execution/Completion

Ability to indicate task completion with checkbox for each step (if job plan associated)

Indicate work that requires two personnel due to safety requirements

Indicate existing known/potential hazards (e.g. asbestos) for location

WO should have the below minimum fields:

Associated location and/or equipment ID

Placeholder for asset information to be printed on work order dependent upon:

WO type

Request/service type

Asset classification

Estimated labor hours

Actual labor hours

Work performed by (allow multiple entries)

Incorporate standard labor rates based upon type/user to tabulate labor costs for WO

Ability to log material/tools used and associated costs, including contractor costs

Should correspond to Parts Inventory (if material listed in Parts)

Area to document notes and work accomplished

Select failure code(s) from a customized dropdown list

Placeholder to list required PPE, tools, and parts on WO

Attach invoices to WOs

Safety requirements, including Lockout/Tagout and MDS

Ability to create additional WO

New WO should be linked as a child to originating WO

Assign/attribute labor & material costs to GL codes and/or departments

## Chargebacks

- Flag work orders to charge back to customer

- Capture and report chargeback costs

- Export chargeback costs in Excel format

### **1.16 MOBILE APPLICATION (Functions performed via mobile device)**

- Application or webpage configured for mobile devices

  - Full functionality available on Android and iOS devices

- Submit SRs and WOs

- Assign & receive WOs

- Notify staff of WO assigned to them

  - Receive push notifications

- Notify user/group of newly submitted SR (ability to enable/disable)

- Has on-board timer to capture work order “start” and “end” times

  - Returns total time attributed to WO

  - Timer can be paused or allow multiple entries

- Check parts availability in Inventory

  - Reserve/request parts

- Assign parts to WO via barcode

- Synchronize data changes to and from database once network connection is restored

- Ability to incorporate images taken by device into WO, asset, etc.

- Accommodate voice to text for notes and freeform fields

- Refresh/update automatically

- View associated (attached & linked) drawings, O&M manuals, etc.

- Create follow-up work order

- Attach pictures

### **1.17 CAPITAL REPLACEMENT PLANNING**

- Can be incorporated into asset record; if separate module, it should link to respective asset(s)

- Minimum fields captured per asset/equipment:

  - Date installed

- Life expectancy (in years)
- Installation or estimated replacement cost
- Report(s) that provide multi-year capital expenditure forecast (minimum 10 years)
- Ability to export data/report into Excel-compatible format
- Calculate the Facility Condition Index (FCI) by building (preferred, but not required)

### **1.18 CONTRACT MANAGEMENT**

- Attach and store contracts and related documents
- Maintain pertinent contract information, such as type, amount, limit, etc.
- Link to contractor information, including contact, licenses, etc.
- Report (notify of) expiring contract documents

### **1.19 CONTRACTOR/VENDOR MANAGEMENT**

- Associate service provided by contractor to service type
- Maintain contact information for multiple personnel at vendor/contractor company
- Attach contract (or link to contract)
- Track contract cost (associate WO costs against contractor)
- Report contractor costs approaching contract limit (preferred, but not required)
- Alert of contract renewal dates (could be handled via Contract Management functionality)
- Associate assets with contract/contractor (preferred but not required)
- Track and report performance indicators (e.g. response time)
- Accommodate list of licenses, certifications, and insurance requirements for each contractor
  - Alert/notify of license/certification/insurance expirations (e.g. certificates of insurance)
- Send work order to contractor
  - Contractor receives work order via e-mail
  - Contractor can accept work order via e-mail
  - Contractor can complete work order via e-mail
- Ability to rate contractor

### **1.20 CUSTOMER SURVEYS**

- Ability to create and deliver customer surveys
- Report results

Create custom surveys

### **1.21 INVENTORY/PARTS MANAGEMENT**

Maintain parts inventory

Set minimum and maximum inventory levels

Alert when minimum level is reached

Incorporate bar codes

2-D bar code

3-D bar code

Link to supplier contact information

Auto-notify supplier when alert/order levels are reached

Inventory-related reports available, such as turnover, inventory age, and product expiration

Identify parts as critical spares

Integrate suppliers' online portal, where applicable

Parts reserved when PMs are generated

Notify if PM forecasted parts are not available

Receive parts on mobile device via barcode

Report parts usage/throughput

Report shelf life and time on shelf by part

### **1.22 PURCHASING**

Ability to submit purchase order (PO) request

Route PO for approval

Approvers and route dependent upon requested amount

Associate WOs and invoices to PO

Track charges against PO amount; report

Notify approvers and requesters of status

### **1.23 LEASE MANAGEMENT (PREFERRED, BUT NOT REQUIRED)**

Identify space as leased or owned

Store or link to electronic copies of lease agreements

Maintain lease/building specific documents

House information, such as:

Site/tenant contact information

Lease type

Rental rates

Ability to auto-notify of lease renewals/expiration

#### **1.24 PROJECT MANAGEMENT**

Create and track projects

Estimate project budget and duration

Assign project/task OWNER(s)

Generate task work orders associated with project

Incorporate Gantt chart view

Identify project task dependencies

Create project templates with associated work orders and tasking

#### **1.25 DOCUMENT MANAGEMENT**

Store or link to electronic copies of drawings, operations & maintenance manuals, test reports, procedures, etc.

Associate files with asset/location

Identify document owner (preferred but not required)

Identify document version/revision (preferred but not required)

Track last review date (preferred but not required)

Provide reminder of scheduled review date (preferred but not required)

#### **1.26 UTILITY MANAGEMENT (PREFERRED, BUT NOT REQUIRED)**

Ability to capture/upload utility data (Excel compatible format)

For electrical bills, document consumption (KWH) and demand (KW) separately, including on & off-peak rates/amounts

Delineate utility use and costs by:

Type (e.g. electric, gas, water, sewer, etc.)

Date range

Actual versus Estimated

Capture utility credits (e.g. sewer)



Report and graph use & costs (Preferred, but not required)

Ability to normalize with weather data

Ability to overlay and compare multiple years (normalized for weather)

Identify null or missing data

#### **1.27 SPACE PLANNING (PREFERRED, BUT NOT REQUIRED)**

Store space/floor plans

Associate occupants with locations (seat assignments)

Ability to create various layout scenarios

Maintain historical copies past configurations

#### **1.28 MOVE MANAGEMENT (PREFERRED, BUT NOT REQUIRED)**

Coordinate & manage move projects

Assign & track project tasks

Communicate tasks to assignees

View status via Gantt chart

Track & report costs by project

#### **1.29 KEY MANAGEMENT (PREFERRED, BUT NOT REQUIRED)**

Maintain inventory of keys and associated locksets

Ability to track check-out/check-in of keys

Track and report to whom keys are assigned

Maintain contact information associated with keys

House information such as biting, master pins, and bottom pins

#### **1.30 TRAINING MANAGEMENT (PREFERRED, BUT NOT REQUIRED)**

Track training/education of staff

Identify skill sets/specialties of staff

Document training activities by staff member

Assign training requirements to staff

Track staff training progress/completion

Store or link to training documents and resources

Maintain list of staff licenses, certifications, credentials, etc.

Notify of expiration/renewal

Track continuing education units by staff member

### **1.31 TIMESHEETS**

Capture and report staff labor hours (preferred, but not required)

Export timesheet information in Excel format (preferred, but not required)

### **1.32 INSPECTIONS**

Generate inspections on a regular or as-needed basis

Create follow-up work orders for failed inspections/tasks

Option for one-to-one ratio (one work order per failed task/inspection) (preferred, but not required)

Options for many-to-one ratio (one work order for all failed tasks/inspections) (preferred, but not required)

Ability to assign ratings to inspections

Low rating trigger follow-up work order

### **1.33 USER INTERFACE**

User-friendly, intuitive interface for all user types

Minimal training necessary for end users

User configurable dashboard for at least higher permission group levels

Numerous means to filter and sort for desired data through the various pages/forms

Query by various means, including, but not limited to:

Asset ID

Location ID

Work Order Number

Assigned Staff

Work Order Status

Work Order Type

Completed Date Range

Ability to print resulting data

Ability to export resulting data into Excel-compatible format

Ability to save query

### 1.34 REPORTS AND DASHBOARDS

Dynamic reporting/ad hoc report capabilities

- Save ad hoc reports for future use

- Save reports into group folders

  - Report folders accessible to specific users/groups

OWNER configurable Dashboard

- User group specific dashboard

  - User specific dashboard (Preferred, but not required)

- Color coded indicators and/or lists based upon set criteria

Incorporates standard and configurable reports and KPIs, including:

- PM/CM ratio

- WO aging report

- Average time to complete WOs

- Average time to review & approve WOs

- Estimated labor hours versus actual hours

- Operating and maintenance costs per asset, location, and/or building

- Tenant/client satisfaction

- Quantity of open WOs

- Quantity of closed WOs

- Quantity of PM WOs and percent completion

  - Also show by Priority

- Number of Service Requests by:

  - Problem/Failure Code

  - Status

- High priority WOs

- Safety-related WOs

- Backlog count

- WOs by Shop

- WOs by Zone

- WOs by Requester

WOs by Department (Requested)

WOs by Assigned Labor/Contractor

Past Due WOs

Percent WOs Rework

Build and schedule customized reports to auto-generate

Automatically send to designee(s) via e-mail

Available reports include, at the minimum, the following:

Cost reports by:

Asset

Location

Site/Chapter

Budget forecast reports

Operations

Capital

Utility costs/use

Able to query and report by site/chapter, region, and aggregate globally

Print directly from report (no need to export)

Report formats include the following:

Browser view

PDF

Excel compatible (.csv, .xlsx)

### **1.35 DATA INTEGRATION**

Ability to export specific data at a prescribed frequency in an Excel-compatible format

Ability to import data to update specific table(s)

Application Program Interface (API) available

Preferable with applications, such as Banner Finance

### **1.36 USER ADMINISTRATION**

Username and password protected

Multiple permission groups with rights configurable OWNER (those with appropriate permissions)

Create user groups based upon Departments and/or Shops

Users can belong to multiple user groups

Users can reset own password

Ability for user to request access (preferred, but not required)

Users can update their contact information

Ability to bulk upload users

Able to deactivate users without losing their history

Send notifications/e-mails to specified user(s)

## **2.0 RESPONSE FORMAT**

### **2.1 SUBMISSION REQUIREMENTS**

Respondent's submission must include:

One (1) electronic copy of proposal on USB thumb drive or via e-mail

One (1) electronic copy of supplemental material, if desired; limited to 25 pages

Complete and return the **System Functionality Checklist** attached to this RFP. Failure to submit completed checklist may eliminate candidate from selection process.

Identify if system can perform each listed function:

“Conforms completely” – capable out-of-the-box without work-arounds

“Able with Work-Around” – can perform with work-around

“Cannot Perform” – system does not currently perform desired function

Provide explanations as necessary to assist with understanding and assessing PROSPECTIVE CMMS PROVIDER responses

Complete and return the provided UAH Software Questionnaire

Provide description of encryption in transit and at rest

Indicate relevant compliance standards (e.g. GDPR)

### **2.2 QUALIFICATION REQUIREMENTS**

To be considered for this contract, respondents must adhere to the below response format and requirements

Firm Qualifications with respect to Request for Proposal's requested services

Statement of qualifications in conformance to section 1.3

Firm Overview including:

Number of Employees

Location(s)

Years in business

Summary of financial strength/position

Complete and return the system functionality checklist attached to this RFP.

Provide summary of costs savings and benefits realized by customers with the implementation of CMMS

Can include in supplemental material

References –Provide names and contact information for each of the following:

Ten (10) Current Customers

At least three Higher Education references

## **2.3 SOFTWARE PRICING**

Provide pricing based upon the following license use estimates and implementation efforts.

Estimated Licensing Requirements

10 concurrent or 25 named user Administrator licenses

Supervisor/Scheduler permissions

System administration

Security & permissions administration

Location/asset add, edit, and delete

Add and edit user definable fields and forms

Add, edit, and delete workflows and OWNER specific rules

25 concurrent or 100 named Technician licenses (should include mobile application)

View and complete work orders via mobile application

View location and equipment/asset information

View, reserve, and add inventory/parts against work orders

Enter data into and complete work orders

Generate select reports (at the minimum)

Unlimited Requester licenses

Submit service requests via online form

View service request history (for those submitted by said Requester when logging into system)

Price the below modules separately, unless included in base price (indicate such with base module pricing); identify module dependencies, if any:

Inventory/Parts Management

Project Management

Key Management

Training Management

Contract Management

Lease Management

Contractor/Vendor Management

Purchasing

Capital Replacement Planning

Space Planning & Management

Move Management

Tool Management

Fleet Management

Start-up Costs and On-Going Support

UAH is leveraging a facility management consultant to assist with the selection and implementation of a CMMS. As such, initial workflow analysis, data gathering, etc. will be completed by the consultant; thus, pricing can be reduced correspondingly for implementation support

Provide estimate to deliver training and implementation support, including bulk importing of data and system configuration.

Include a typical syllabus for implementation training (distinguish percentage on-site versus online)

UAH requests a three-year price lock with increases thereafter not to exceed changes in the consumer price index; will be included in licensing agreement

Price includes updates and enhancements for purchased module(s) throughout life of licensing agreement

## **2.4 ADDITIONAL NOTES/COMMENTS**

Identify any shortcomings of software compared to stated requirements and preferences

Provide additional comments or recommendations

UAH may desire to visit United States headquarters to meet management, support, and development teams

Describe database export options at termination of service contract

## 2.5 SELECTION PROCESS

### SELECTION CRITERIA

PROSPECTIVE CMMS PROVIDER must meet PROSPECTIVE CMMS PROVIDER qualifications as specified in section 1.3 to be considered

Respondents will be evaluated per the below evaluation criteria; respondents need to complete and return the included CMMS RFP Function Checklist

The top three (3) PROSPECTIVE CMMS PROVIDERS as identified via the evaluation criteria, will be invited to provide demonstrations of their software and to compete for final selection.

## 2.6 BIDDER SELECTION

Top three respondents from will conduct the aforementioned product demonstration which includes a “test fit” of the OWNER’s workflow processes.

The demonstration will be conducted on-site or remotely via online web-based meeting that is provided by the PROSPECTIVE CMMS PROVIDER at no charge to OWNER

OWNER will provide PROSPECTIVE CMMS PROVIDERS with OWNER’s test script, which candidates will follow during demonstration.

The top three respondents will be judged via the below weighted criteria:

**50%** -Completely satisfying all above stated requirements. Deviations/shortcomings should be noted by respondent; failure to meet requirements may detract from scoring.

**25%** - Overall Functionality & Ease-of-Use as voted upon by selection committee

Satisfaction of “preferred” functionality as identified in the specification

**25%** - Three-year software costs (including training and support)

The top scorer will be selected for contract negotiations

## 2.7 TIMELINE

- RFP submitted to PROSPECTIVE CMMS PROVIDERS December 12th, 2019
  - PROSPECTIVE CMMS PROVIDER will acknowledge receipt of RFP and inform OWNER of intent to respond by **January 3, 2020**.
  - Questions regarding RFP will be due by back by **January 3, 2020** at 5pm.



- **RFP Responses (including completed CMMS Functionality Checklist) due to OWNER by January 9, 2020 at 1:30pm**
- Top 3 respondents will be selected and notified by January 27, 2020 and invitation to provide an on-site demonstration
- Finalists conduct on-site product demonstrations with top 3 respondents the week of February 10, 2020.
- Inform of intent to award by February 20, 2020
- Draft pilot project schedule by February 28, 2020 (in partnership with CMMS Consultant)
- Implementation Kick-Off Meeting (Virtually) by March 6, 2020
- Implementation (on-site) to start March 23, 2020
- Cutover to new system is scheduled for August 10, 2020

### **3.0 COST PROPOSAL (as attachment)**

### **4.0 EXECUTION OF PROPOSAL**

By submitting this proposal, the potential vendor certifies the following:

1. This proposal is signed by an authorized representative of the firm.
2. The costs associated with performing the service described herein have been determined and included in the proposed cost.

3. All labor costs, direct and indirect, have been determined and included in the proposed cost.
4. The potential vendor has read and understands the conditions set forth in this RFP, and agrees to them with no exceptions.

Therefore, in compliance with this RFP and subject to all conditions herein, the undersigned offers and agrees, if this proposal is accepted within 60 days from the date of the opening, to furnish the services.

VENDOR: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY, STATE, ZIP: \_\_\_\_\_

FEDERAL EMPLOYER IDENTIFICATION NUMBER:  
\_\_\_\_\_

BY: \_\_\_\_\_

TITLE: \_\_\_\_\_

(Signature)

\_\_\_\_\_  
(Typed or Printed)

\_\_\_\_\_  
(Date)

## 5.0 GENERAL INFORMATION

**5.1 Time for Acceptance:** Each proposal shall state that it is a firm offer which may be accepted within a period of 60 days. Although the contract is expected to be awarded prior to that time, the 60 day period is requested to allow for unforeseen delays.

**5.2 Vendor's Representative:** Each vendor shall submit with its proposal the name, address, and telephone number of the person(s) with authority to bind the firm and answer questions or provide clarification concerning the firm's proposal.

## 6.0 CONTRACT TERMS AND CONDITIONS

### (Contractual and Consultant Services)

- 6.1 **Governing Law:** This contract is made under and shall be governed and construed in accordance with the laws of the State of Alabama.
- 6.2 **Situs:** The place of this contract, its situs and forum, shall be Alabama, where all matters, whether sounding in contract or tort, relating to its validity, construction, interpretation, and enforcement shall be determined.
- 6.3 **Standard of Performance:** The Vendor shall give its best effort to the performance of its undertaking under this contract, shall perform all services to be provided hereunder consistent with the highest standards of care, skill, and diligence, and shall employ sound, business-like, effective, and exemplary practices.
- 6.4 **Interest of Vendor:** The Vendor covenants that it presently has no interest, direct or indirect, which would conflict in any manner or degree with the performance of its services hereunder. The Vendor further covenants that in the performance of this proposal no such person having such interest shall be employed or engaged.
- 6.5 **Key Personnel:** The Vendor shall not substitute key personnel assigned to the performance of this contract without prior written approval by the University's Contract Administrator. The individuals designated as key personnel for purposes of this contract are those specified in the Vendor's proposal.
- 6.6 **Force Majeure:** The Vendor shall notify the University promptly of any material delay in the performance of the work specified and shall state in writing the revised performance date as soon as practicable after the notice of delay. Neither party shall not be liable for delays in performance

unavoidably caused by circumstances beyond its control, such as labor disputes, civil disorders, acts of war, acts of God, governmental action, etc., but it will be liable for all other delays, including specifically that caused by its own fault or negligence.

In case of default by the Vendor, The University of Alabama in Huntsville may procure the services from other sources and hold the Vendor responsible for any excess cost incurred thereby. The University reserves the right to require performance bond or other acceptable alternative guarantees from successful vendor without expense to the University. Upon the entering of a judgment of bankruptcy or insolvency by or against the Vendor, the University may terminate this contract for cause.

- 6.7 **Termination:** If either party shall be in material breach of a provision of this Agreement and such breach shall not be cured within sixty (60) days after receipt of written notice thereof, then, in addition to all other remedies available to it, the non-breaching party may elect to terminate this Agreement. Notwithstanding the foregoing, neither party shall be considered to have breached a provision hereof if performance is prevented or delayed by act of God or other circumstance beyond a party's reasonable control.
- 6.8 **Additional Termination Rights:** Vendor may terminate this proposal at any time by notice to the University without further liability, if any of Vendor's permits or other approvals required from any governmental authority or any licenses required from any third party to operate its business is canceled, expires, or is withdrawn or terminated without fault on the part of the Vendor, or if the University fails to have authority to enter in this contract. Upon such termination, the University shall be paid any amounts owed by Vendor as of the date of termination; however, Vendor will be relieved of all other obligations under this proposal.
- 6.9 **Conduct on Premises:**
- a) The Vendor agrees that all persons working for and on behalf of it whose duties bring them upon the University's premises shall obey all applicable rules and regulations established by the University and shall comply with the reasonable directions of the University's officers.
  - c) The Vendor shall be responsible for the acts of its employees and agents while on the University's premises and for all injury to persons and damages to property located on University premises caused by its employees and agents. Accordingly, the Vendor agrees to take all necessary measures to prevent such injury and damage. The Vendor shall promptly repair, to the specifications of the University's Physical Plant Director, any damage that it, or its employees or agent may cause to the University's premises or

equipment. In the event the Vendor fails to do so, the University may repair such damage and the Vendor shall reimburse the University promptly for the cost of repair.

- b) The Vendor agrees that, in the event of an accident of any kind on the University's premises involving any of its employees or agents, the Vendor will immediately notify Laurel Long, Associate Vice President, Human Resources, and thereafter furnish a full written report of such accident.

6.10 **Availability of Funds:** Any and all payments to the Vendor are dependent upon and subject to the availability of funds to The University of Alabama in Huntsville for the purpose set forth in this agreement.

6.11 **Assignment:** No assignment of the Vendor's obligations or the Vendor's right to receive payment hereunder shall be permitted. However, upon written request approved by the issuing procurement authority, the University may:

- a) Forward the contractor's payment check(s) directly to any person or entity designated by the Vendor, or
- b) Include any person or entity designated by the Vendor as a joint payee on the Vendor's payment check(s).

In no event shall such approval and action obligate the University to anyone other than the Vendor and the Vendor shall remain responsible for fulfillment of all contract obligations.

6.12 **Compliance with Law:** The Vendor shall comply with all laws, ordinances, codes, rules, regulations, and licensing requirements that are applicable to the conduct of its business, including those of federal, state, and local agencies having jurisdiction and/or authority.

6.13 **Nondiscrimination:** Operator agrees that it shall not, with respect to any activity carried out on the premises of the University or relating in any way to this Agreement, discriminate unlawfully against any person on the basis of race, color, national origin, religion, sex (including marital or parental status), pregnancy, sexual orientation, gender identity, age, disability, citizenship, genetic information or status as a disabled veteran, a recently separated veteran, an active duty wartime or campaign badge veteran, and an Armed Forces services medal veteran. The equal opportunity clauses required under Executive Order 11246 and regulations issued thereunder are made a part of this Agreement by reference.

- 6.14 **Insurance:** The Vendor is only responsible for general property risks of accidental loss to the building, and/or other equipment or furnishings owned by the University and provided to the Vendor under this contract, except when caused by Vendor negligence.

The Vendor shall maintain in force at all times during the terms of this proposal, with responsible insurance carriers, the following:

- a) Workers' Compensation Insurance, required by the laws of Alabama, in the amount of the statutory limits, covering all of the Vendor's employees engaged in any work hereunder and, in case any work is sublet, the vendor shall require the insurance for all of the subcontractor's employees unless such employees are covered by the protection afforded by the Vendor's insurance.
- b) Automobile liability insurance in the amount of \$300,000 per person and \$500,000 per occurrence, if the use of an automobile by the Vendor is involved in or related to its performance under the contract.
- c) General liability insurance, in appropriate amounts as mutually agreed by Vendor and University.

The Vendor shall provide annually a Certificate of Insurance to the University with respect to one (1) or more of the foregoing coverages. The University shall be made an additional insured on any of such policies of insurance.

- 6.15 **University Name – Limitations on Use:** The vendor shall not use, in its external advertising, marketing programs, or other promotional efforts, any data, pictures, or other representation of the University except on the specific written authorization of Laurel Long, Associate Vice President, Human Resources. However, the Vendor shall be allowed to include the University on its routine client list for matters of reference.

- 6.16 **Entire Agreement.** This proposal and any documents incorporated specifically by reference represent the entire agreement between the parties and supersede all prior oral or written statements or agreements. This Request for Proposals, any addenda thereto, and the vendor's proposal are incorporated herein by reference as though set forth verbatim.

All promises, requirements, terms, conditions, provisions, representations, guarantees, and warranties contained herein shall survive the contract expiration or termination date unless specifically provided otherwise herein, or unless superseded by applicable Federal or State statutes of limitation.

6.17 **Amendments:** This proposal may be amended only by written amendments duly executed by The University of Alabama in Huntsville and the Vendor.

**Note:** In order for an alternate bid to be considered, bidders must supply current catalogs or brochures, including pictorials and specifications.

**Please indicate your company classification by circling the appropriate initial:** Small Business (**SB**), a Small Disadvantaged Business (**SD**), a Black Small Disadvantaged Business (**BD**), a Woman-Owned Small Business (**WB**), a Woman-Owned Small Disadvantaged Business (**WD**), a Black Woman-Owned Small Disadvantaged Business (**BW**), a Large Business (**LB**), an Individual (**IN**), Educational (**ED**), Non-Profit (**NP**), a Labor Surplus Area Concern (**LS**), Disabled Veteran-Owned Small Business (**DV**), Veteran-Owned Small Business (**VS**), Historically Underutilized Business Zone (**UZ**), or a Governmental Agency (**GV**).

F.O.B. Point	TERMS	WARRANTY
UAHUNTSVILLE DESTINATION		
ESTIMATED DELIVERY	YOUR REFERENCE NO.*	QUOTATION EFFECTIVE UNTIL

\* Your company reference number, if applicable with this bid quotation.

**Certification Pursuant To Act No. 2006-557**

**Alabama Law (Section 41-4-116, Code of Alabama 1975)** provides that every bid submitted and contract executed shall contain a certification that the vendor, contractor, and all of its affiliates that make sales for delivery into Alabama or leases for use in Alabama are registered, collecting, and remitting Alabama state and local sales, use, and/or lease tax on all taxable sales and leases into Alabama. By submitting this bid, the bidder is hereby certifying that they are in full compliance with Act No. 2006-557, they are not barred from bidding or entering into a contract pursuant to 41-4-116, and acknowledges that the awarding authority may declare the contract void if the certification is false.

\_\_\_\_\_  
COMPANY NAME (TYPE OR PRINT)

\_\_\_\_\_  
TELEPHONE NUMBER

\_\_\_\_\_  
SIGNER'S NAME (TYPE OR PRINT)

\_\_\_\_\_  
FAX NUMBER

\_\_\_\_\_  
EMAIL ADDRESS

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
DATE

The University of Alabama in Huntsville prohibits the installation of asbestos on its campus. Suppliers and contractors will not supply any equipment, material, or supplies, which contain asbestos without prior written approval.

Failure to designate Bid Number and Opening Date on the outside of your sealed envelope containing your bid and more than one bid submitted in this envelope will result in a "No Bid" response in accordance with Alabama Competitive Bid Law 41-16-24 sub-part b.

The University of Alabama in Huntsville will not accept faxed bids.

Any product that fails to meet the specifications, performance requirements or compatibility requirements will be rejected and returned to the vendor at no cost to the University.

REV. 9/09



## State of Alabama Immigration Law

If the successful bidder is located in Alabama or employs an individual or individuals within the State of Alabama, the successful bidder shall provide a copy of its Employment Eligibility Verification (E-Verify) company profile. To expedite the ordering process, this document may be submitted with the bid response.

If the successful bidder is not located in the State of Alabama and does not employ an individual or individuals within the State of Alabama, the successful bidder shall complete and return the Certification of Compliance form included with this Request for Price Quotation (E-Verify company profile is not required). To expedite the ordering process, this document may be submitted with the bid response.

If you are not currently enrolled in E-Verify, follow these instructions:

- Log onto [www.uscis.gov/everify](http://www.uscis.gov/everify)
- Click “Getting Started” for information about the program, requirements, and enrollment process.
- Click “Enroll in E-Verify” and begin enrollment process.
- When enrollment process is complete, click “Edit Company Profile” and print this one-page document.
- This one-page document must be submitted prior to a contract or purchase order being issued.
- For further assistance please consult the [E-Verify Quick Reference Guide](#).

If you have previously enrolled in E-Verify, follow these instructions:

- Log onto [www.uscis.gov/everify](http://www.uscis.gov/everify)
- Click “Edit Company Profile” and print this one-page document.
- This one-page document must be submitted prior to a contract or purchase order being issued.



## **CERTIFICATION OF COMPLIANCE WITH THE STATE OF ALABAMA IMMIGRATION LAW**

The undersigned officer of \_\_\_\_\_ (Company)  
Certifies to the Board of Trustees of the University of Alabama that the Company  
does not employ an individual or individuals within the State of Alabama.

\_\_\_\_\_  
SIGNATURE OF COMPANY OFFICER

\_\_\_\_\_  
PRINT COMPANY NAME

\_\_\_\_\_  
PRINT NAME OF COMPANY OFFICER

\_\_\_\_\_  
PRINT TITLE OF COMPANY OFFICER

\_\_\_\_\_  
**DATE**



THE UNIVERSITY of  
ALABAMA SYSTEM

### VENDOR DISCLOSURE STATEMENT

In compliance with the policies of The Board of Trustees of the University of Alabama, The University of Alabama System Office, this University, and with Alabama state law, this Disclosure Statement shall be completed for all contracts, such as proposals, bids, and contracts, including consulting/professional service contracts unless otherwise exempted ("Agreements"). The Board of Trustees of The University of Alabama reserves the right to refuse to enter into or to cancel, without penalty, any contract or agreement with any entity or individual who does not provide all of the information requested below, or who makes false or incomplete disclosures.

#### Definitions

For the purposes of this form, the following terms shall have the following meanings:

- **"Agreement."** Any agreement, contract, memorandum of understanding, or grant document under which goods or services are to be provided by You.
- **"Family Member."** Your spouse, dependent, an adult child and his or her spouse, a parent, a spouse's parents, and a sibling and his or her spouse. The term "Dependent" shall include any person, regardless of his or her legal residence or domicile, who receives more than 50 percent of his or her support from the public official or employee or his or her spouse, or who resides with the public official or employee for more than 100 days during the reporting period.
- **"Public Official."** Any person elected to public office, whether or not that person has taken office, by vote of the people at state, county, or municipal level of government or their instrumentalities, including governmental corporations, and any person appointed to take a position at the state, county, or municipal level of government or their instrumentalities, including governmental corporations.
- **"Relationship."** Limited to familial or business in nature, or a personal relationship that the existence of which creates a Conflict of Interest or the appearance of a Conflict of Interest that would require disclosure under [Board Rule 106](#).
- **"UAS."** The Board of Trustees of The University of Alabama, and its constituent divisions including The University of Alabama System Office, The University of Alabama, The University of Alabama at Birmingham, and The University of Alabama in Huntsville.
- **"You."** Includes, (1) the entity or individual who would be a party to the Agreement, (2) any partner, division or related business, (3) any member of your immediate family or any individual employed by You (that You know to have a direct familial relationship with a UAS employee or official or family member of a UAS employee or official).

#### 1. Name of Entity or Individual Completing this Form (proposed contracting party)

Entity Name:

Individual Name:

Title:

Address Line 1:

Address Line 2:

City, State, Zip:  Telephone:

#### 2. UAS Entity with which you propose an Agreement? (i.e. University, College, Department, etc.)

#### 3. Describe the proposed Agreement:

Goods and services to be provided:

Grant or proposal number (if applicable):

Amount or anticipated amount:

Term:

Is the proposed Agreement the result of a competitive or bid process?  Yes  No

4. Have "You" (See definition above) previously provided goods and/ or services to UAS within the current or last fiscal year?  Yes  No

If yes, please provide the following information for each other agreement for such goods and/or services.

Entity Providing Goods or Services:

Campus and Department:

Type of Goods/Services:

Amount Received:

Entity Providing Goods or Services:

Campus and Department:

Type of Goods/Services:

Amount Received:

*If you need to provide further details on goods or services provided to UAS within the current or last fiscal year, please attach an addendum to this Disclosure Statement.*

5. Did the amount of goods and/or services identified in response to Question 4 total \$1,000,000 or more?

Yes  No

6. Do you have a relationship with a UAS employee, UAS Trustee, or Public Official who may directly or indirectly receive any benefit from the proposed Agreement or whose family member may directly or indirectly benefit?

Yes  No

If yes, please provide the following information for each UAS employee, Trustee, or Public Official with whom You have a Relationship.

Name of UAS employee, Trustee, or Public Official:

Campus/department where employed or position held:

Nature of relationship:

Potential Benefit:

Name of UAS employee, Trustee, or Public Official:

Campus/department where employed or position held:

Nature of relationship:

Potential Benefit:

*If you need to provide further information regarding UAS employees, Trustees, or Public Officials with whom You have a Relationship, and who may directly or indirectly benefit from this Agreement, please attach an addendum to this Disclosure Statement.*

**7. Have any paid consultants and/or lobbyists assisted in obtaining the proposed Agreement?**

Yes  No

If yes, please provide the following information for each consultant or lobbyist.

Name:

Address:

Name:

Address:

*If you need to provide further information regarding paid consultants and/or lobbyists utilized to obtain the proposed Agreement, please attach an addendum to this Disclosure Statement.*

**8. List any current litigation or administrative action that has been filed within the last 3 years, either state or federal, related to public or higher education construction or finance that the contractor or others associated with the firm may have against them.**

By signing below, I certify under oath and penalty of perjury that all statements on or attached to this form are true and correct to the best of my knowledge. By proposing or entering into an Agreement with UAS, I certify that no employee or official of UAS, nor any of their family members or any business with which they may be associated, will receive a benefit from this contract, except as has been disclosed, in writing herein. I will promptly disclose any Relationship which may arise in the future, or any existing Relationship which may become known to me, and update this statement to disclose the same.

Signature

Date