



**INVITATION FOR BID NUMBER AEPA IFB #008-A**  
**ADMINISTRATIVE SOFTWARE**

**PART B – SPECIFICATIONS**

**TABLE OF CONTENTS**

<b>1. Scope of Bid .....</b>	<b>1</b>
<b>2. Anticipated Member Agency Participation .....</b>	<b>2</b>
<b>3. Glossary of Terms.....</b>	<b>2</b>
<b>4. Special Terms &amp; Conditions.....</b>	<b>3</b>
<b>5. Specifications .....</b>	<b>3</b>
<b>6. Substantiating Documentation.....</b>	<b>4</b>

**1. Scope of Bid**

AEPA agencies are seeking a contract for facility management systems and services. A fully web-architected management system is sought to enhance workflow and increase production in facility management of AEPA member’s institutions. The system provider shall provide a complete and operational management system per the requirements of this IFB. The product is to include all software, specialized hardware, technical support, licensing, training, travel and any related expenses necessary to implement the system as described herein. The supplier is solely responsible for making the management system operational on existing owner computer and network equipment as described in this IFB. The system is to be delivered complete, fully functional, and fully documented, and the Owner 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 and annual maintenance costs.

## 2. Anticipated AEPA Member Agency Participation

State	Participate (Yes/No/Undecided)	Estimated First year Purchase Volume	State	Participate (Yes/No/Undecided)	Estimated First year Purchase Volume
Arkansas	No		Nebraska	Yes	Unknown
California	Yes	\$200,000	New Mexico	Yes	\$500,000
Colorado	Yes	Unknown	North Dakota	Yes	Unknown
Connecticut	Yes	\$100,000	Ohio	Yes	Unknown
Indiana	Yes	Unknown	Oregon	Yes	Unknown
Iowa	Yes	\$100,000	Pennsylvania	Yes	\$300,000
Kansas	Yes	\$25,000	Texas	No	
Kentucky	Yes	Unknown	Virginia	Yes	\$100,000
Michigan	Yes	Unknown	Washington	Yes	\$65,000
Minnesota	Yes	Unknown	Wyoming	Yes	Unknown
Missouri	Yes	\$50,000			
Montana	Yes	\$50,000	Total		\$1,490,000

Participating in the solicitation does not guarantee that an AEPA Member Agency will enter into a contract with any vendor. Each AEPA Member Agency will make that determination after reviewing AEPA recommended bids. The AEPA Member Agency's contracting decision shall be final.

Estimated first year volume for this solicitation is provided above where available. AEPA Member Agencies anticipate that purchase volume will increase in contract years 2-4. This information is provided as an aid to vendors in preparing bids only. It is not to be considered a guarantee of volume under this IFB. The successful vendor's discount and pricing schedule shall apply regardless of the volume of business under the contract.

## 3. Glossary of Terms

**AEPA Member Agency:** A state cooperative purchasing agency recognized by AEPA to represent a specified state in contracting activities associated with this solicitation.

**ASP:** Application Service Provider

**Contracting AEPA Member Agency:** An AEPA Member Agency that enters into a contract as a result of this solicitation.

**Member:** A public school district or other qualifying agency authorized to use the contracts of an AEPA Member Agency.

**Vendor:** Individual or entity providing goods and services to AEPA members based on the specifications of this solicitation.

#### 4. Special Terms & Conditions

- 4.1 By responding to this solicitation, the vendor agrees to and will be solely responsible for doing the research to ascertain that its solution meets or exceeds all federal, state and local regulations, rules, standards and requirements.
- 4.2 The successful vendor must give AEPA members the benefit of all general price reductions extended to its other customers at any time during the period of this contract or any extension thereof. Written notice will be made to AEPA members in the event of a decrease in the prevailing contract price and will become effective immediately.
- 4.3 The successful vendor must abide by all applicable federal, state, and local laws, codes, and ordinances governing any area(s) in which any service is rendered and must have all required permits, licenses, agreements, tariffs, bonding and insurance required by same. No claims for additional payment will be approved for changes required to comply with any such requirements.
- 4.4 If the vendor 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 must clearly state and identify all associated costs with these providers.
- 4.5 Responses must clearly identify all charges and components necessary for performance of the contract even if such are not specifically addressed in any paragraph or sub-paragraph or form that is a part of this request.
- 4.6 Optional services must be identified separately, and must include clear descriptions of proposed services.
- 4.7 The software solution(s) used in responding to this IFB must contain reporting components which can be customized and configured to assist in obtaining, compiling, analyzing, reporting and submitting various information required by federal, state and local oversight agencies.
- 4.8 All hardware configurations needed to implement the proposed solution(s) must utilize the latest CPU, operating systems and networking technology. All equipment must meet or exceed all current industry standards.
- 4.10 The vendor must have the resources to provide a comprehensive training program on the operation and use of the solution components offered. The training program offered must be appropriate for the AEPA members' staff that will use the solution. The vendor must provide documentation that proves this training exists and can be successfully delivered on a national basis. If customized training is available, the vendor should submit hourly rates for any customization services offered.
- 4.11 Vendors must provide a product or mix of products in a manner that will allow contract participants 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.
- 4.12 The vendor must provide a technical support system that will facilitate the troubleshooting and resolution of problems and/or issues that may arise with AEPA member based Server and Workstation hardware or software, and application software components of the proposed solution(s).

## 5. Specifications

5.1			<b>Administrative Software</b>
	5.1.1		<b><u>Administrative Module – Provides system administration functions such as security, system-wide defaults and content of function and forms.</u></b>
		5.1.1a	Power user with full access from single log-in
		5.1.1b	Web access to administration
		5.1.1c	Multi-level security
		5.1.1d	Users functional permission level displayed
		5.1.1e	Provides help text and error messages
		5.1.1f	Permits multimedia file attachments (Word files, graphic images, audio or video clips) to record as work orders
	5.1.2		<b><u>Asset Management – Identifies, tracks, locates and analyzes physical assets.</u></b>
		5.1.2a	Provides graphical asset trees
		5.1.2b	Drop-down list of values for assets, locations, classifications
		5.1.2c	Instant display of all assets, locations, classifications
		5.1.2d	Standard equipment templates
		5.1.2e	Allows warranty tracking
		5.1.2f	Lists outstanding jobs by equipment, asset class, location
		5.1.2g	Lifetime labor and material costs per equipment, asset classification and location
		5.1.2h	Tracks historical total of maintenance costs per asset
	5.1.3		<b><u>Work Order Management – Controls work order processes for routine response and periodic preventive maintenance.</u></b>
		5.1.3a	Database of employees along with labor rate information
		5.1.3b	Database of vendors
		5.1.3c	Ability to capture labor hours, contract costs and material costs for each work order
		5.1.3d	Records equipment downtime
		5.1.3e	Charge multiple wage rates
		5.1.3f	Request dates and completion dates
		5.1.3g	Estimated and actual hours
		5.1.3h	User definable tracking fields
		5.1.3i	Easy interface to check work order status with selection masks
		5.1.3j	Search capability on work order number or description key

		5.1.3k	Fully integrated with related modules including preventive maintenance, facility scheduling and inventory
		5.1.3l	Automatic computation of work costs using labor rates in employee module
		5.1.3m	The work order module will integrate with the school site request and Asset Management module
		5.1.3n	Track tool usage against work orders
		5.1.3o	Tracks require permitting
		5.1.3p	Re-open closed work orders
	5.1.4		<u>Materials Management</u> – Streamlines parts and materials management by monitoring inventory.
		5.1.4a	Manage inventory items by category types: mechanical custodial, tools and others.
		5.1.4b	Tracks all inventory transactions, including issues, receipts, returns adjustments, orders and transfers
		5.1.4c	Allows inventory to be issued to a location, pick list, project, work order or employee
		5.1.4d	Enables requestor the ability to select items from inventory catalogs and submit inventory requests online
		5.1.4e	Enables users to request quotes for inventory items from multiple supplies while reordering
		5.1.4f	Tracks detailed information on inventory items, including unit of issue, on contract, supplies, average or fixed costs, tag number for tolls, mark up and backorder quantity
		5.1.4g	Allows inventory items to be stored and tracked in multiple pools and by crafts, including aisle, bin number and reorder points
		5.1.4h	Automatically emails requestors with inventory requests, receipts and updates of order status changes
		5.1.4i	Integrates with the work order and preventive maintenance module
		5.1.4j	ISO certified units of measure
		5.1.4k	Provides pick lists
		5.1.4l	Optional parts inspection requirement per part
	5.1.5		<u>Technology Work Management</u> – Tracks work orders for the instructional technology department.
		5.1.5a	Staff originates work order requests for IT problems
		5.1.5b	Status of work orders can be continually monitored by staff
		5.1.5c	Systems routes requests to proper technician using configurable work flow
		5.1.5d	The work order management provides for tracking of labor and parts for each incident

	5.1.5e	Warranty of technology items are continually monitored
5.1.6		<u>Preventive Maintenance</u> – Provides the functionality for users to establish preventive maintenance practices to meet their unique environments.
	5.1.6a	Schedule PM by elapsed days
	5.1.6b	Schedule PM by calendar date
	5.1.6c	Schedule PM by usage
	5.1.6d	View labor, material and tool cost for anticipated tasks
	5.1.6e	Tracks all scheduled maintenance
	5.1.6f	Creates recurring maintenance scheduled on a daily, weekly, monthly or annual basis
	5.1.6g	Stores schedule templates for quick creation of frequently used schedule
	5.1.6h	Tracks equipment information, including manufacturer, model and serial numbers, in and out service dates and warranty.
	5.1.6i	Automatically generates PM work orders through an integration with work order system
	5.1.6j	Displays incoming scheduled work in a calendar format for resource scheduling
5.1.7		<u>Budget Management</u> – Automates budgets setup and subsequent capture, monitoring control and analysis of expenditures associated with maintenance work.
	5.1.7a	Allow district to establish budget code format
	5.1.7b	Permit flexible budget terms and budget periods
	5.1.7c	Provide for flexible budget hierarchies
	5.1.7d	Analyze costs vs. budget per budget period and year-to-date
5.1.8		<u>Reports Generation</u> – Reports are a key to any facility management system. This information may either be generated from the individual modules, from a single Reports Module or a combination.
<i>Report options should include graphs and tabular reports in HTML, PDF, or Microsoft Excel format. Search capability should be as easy as defining your criteria in a specified field or fields and the system returning with the resulting information.</i>		
	5.1.8a	<b>Topic</b>
		Craft
		Location
		Budget
		Employee
		Craft cost analysis
		Transactions
		Outstanding work
		Work load and assignments
		Status of work

	5.1.8b	<b>Standard Inventory Reports</b> - Summary or detailed reports by
		Issued inventory
		Returned inventory
		Transferred inventory
		Supplier reports
		Pick list reports
	5.1.8c	<b>Standard Preventive Maintenance Reports</b> - Summary or detailed reports by
		Projected parts and supplies reports
		Estimated PM labor reports
		Forecasting labor report
		Corrective vs. preventive maintenance report
	5.1.8d	<b>Standard Facility Scheduling Reports</b> - Summary or detailed reports by
		Location
		Organization
		Schedules
		Budget
		Invoices
		Reminders
	5.1.8e	<b>Standard Utility Reports</b>
		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
		Load factor report
5.1.9		<u>Utility Management</u> – Track, analyze and provide full reporting on all utilities.
	5.1.9a	Ability to manage all utilities including electric, gas, water, sewer, fuel oil, propane, trash, waste, telephone and other utilities
	5.1.9b	Tracks essential account, vendor building and user information
	5.1.9c	Tracks basic utility billing determinants on monthly bills for each account and/or meter including billing periods, billing period consumption, billing period cost and average period unit cost. Bills are to be tracked by month, year and building.

		5.1.9d	Ability to track user-defined data such as hours of use, number of occupants, etc.
		5.1.9e	Provides use and cost budget function for monthly and annual budget analysis
		5.1.9f	Customizable user-defined advanced utility bill determinants including power factor, time-of-use, taxes, service charges and deregulated bill determinants
		5.1.9g	Performs current versus baseline comparisons including application of weather normalization for more accurate comparison of utility data from year to year. Weather normalization is performed by matching daily weather degree-days with actual billing periods of utility bills. Degree data is automatically uploaded into Utility direct from the National Weather Service on a monthly basis.
		5.1.9h	Easily exports data to any spreadsheet format.
		5.1.9i	Provides virtual and sub-meter tracking. Sub-meter tracking will support internal organization chargeback requirements.
		5.1.9j	Utility bill validity checking with multiple parameter analysis.
	5.1.10		<u>Facility Scheduling System</u> – Allows the facility and business office personnel to coordinate the non-curricular events and activities in the school districts.
		5.2.10a	Multiple routing rules for event approval
		5.2.10b	Email notification to support personnel
		5.2.10c	Database of areas available for after hour usage
		5.2.10d	Ability to handle events with multiple dates with a repeating pattern as well as random series of events
		5.2.10e	Billing and rental administration
		5.2.10f	Multiple levels of security
5.2			<b>Functionality</b>
	5.2.1		The system will be configured to allow remote non-maintenance personnel to request service, inventory or events from the district maintenance department (or other support personnel) through an Internet web browser. This will allow the district to move towards a paperless work order and facility-related processes and reduce the handoff delays and process costs associated with the request processes. In addition, the system should allow the remote site requesters to be provided status updates on requests that have been previously submitted. This status update should be filtered or password protected so that the requester only sees requests that have been previously submitted by him or her. In addition, the system should support email notifications that allow the maintenance department to automatically notify work order requesters when work is completed or when work is delayed due to parts orders or other reasons. 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.

## 6. Substantiating documentation

The information requested below will be used by AEPA and AEPA Member Agencies to substantiate compliance with the requirements of the solicitation. Vendors are strongly encouraged to provide complete and accurate information. Failure to provide complete information, as requested, may result in a determination of the bid being non-responsive. Include your printed and electronic responses in Part C, Bid Forms.

### 6.1 Experience

- 6.1.1 Indicate the number of years the vendor has been in business.
- 6.1.2 Provide resumes and information on key personnel, including an account manager.
- 6.1.3 Provide a reference list of current clients, preferably with a wide range of student enrollments. For each client, provide a contact person and contact information and the year the client began using the vendor's Transportation Management program.
- 6.1.4 Indicate the number of school systems currently using your product(s).
- 6.1.5 Provide an implementation schedule, including tasks, resources, durations to 6.3.1, and dependencies. The implementation schedule should be based upon the number of days after award of a contract.

### 6.2 Technical Requirements

- 6.2.1 Indicate if your Administrative Software system utilizes an ASP and/or local Server based platform for hosting, administering, and using your product.
- 6.2.2 Provide minimum hardware requirements for the local Server, if applicable.
- 6.2.3 Provide minimum hardware requirements for customer computer workstations required to use your product. Include requirements for both ASP and/or local Server scenarios.
- 6.2.4 Provide a listing of Server software Operating Systems your product is compatible with, include minimum version needed to properly run your product.
- 6.2.5 Provide a listing of Workstation software Operating Systems your product is compatible with, include minimum version needed to properly run your product.
- 6.2.6 Provide a listing of application software, including word processors, spreadsheets and web browsers, that are required to operate your program.

Please describe what the owner school district should have in infrastructure in order to support your proposed system including hardware, network infrastructure and personnel/skills required to support the system. Provide the following information:

Item	Response
Database Server	
Application Server	
Web Server	
Skills required or needed to be successful	

Estimated cost of major upgrades over 3 years	
Estimated hours per year for performing database administration	
Estimated hours per year performing data backups	
System user operating system and hardware requirements	
System user hardware required	
Remote site requester hardware and software requirements	

Vendor is to state any other requirements of the customer for hardware, software, support or other items that will contribute to the total cost of ownership for each software application being proposed. Failure to disclose a vendor-induced ownership cost requirement will result in the vendor providing undisclosed hardware, software or services at no additional charge to the client.

### **6.3 Software Functionality**

- 6.3.1 Provide a listing of modules for your product and what specifications from Section 5 are included in each.
- 6.3.2 Indicate how often upgrades are made to the system, including the testing processes used before implementation of an upgrade.
- 6.3.3 Describe any additional reporting capabilities, not listed in the response to 6.3.1, available to the customer. Provide sample copies of all reports.
- 6.3.4 Indicate how long 'history' records are maintained for use by the customer.
- 6.3.5 Describe the system's security capabilities and the privacy protection available to customers.
- 6.3.6 Provide website information to include administrative access to the site. Include instructions and screen shots for navigating the various site tools.

### **6.4 Training and Support**

- 6.4.1 Describe your company's warranty policy for your product.
- 6.4.2 Provide samples of instructional and training documentation available to customers.
- 6.4.3 Describe any training services available to contracting AEPA Member Agencies and 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.
- 6.4.4 List any additional training services and costs available to customers.
- 6.4.5 List any available update and support contracts, including policy and frequency, for your program.

- 6.4.6 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.
- 6.4.7 Submit a preliminary plan on how you would help the AEAP rollout this program to the AEPA member organizations and their affiliated educational institutions.