

CONFIDENTIAL



REQUEST FOR PROPOSAL

INTEGRATED WORKPLACE MANAGEMENT SOFTWARE SOLUTION

ISSUE DATE

May 3, 2024

PROPOSAL DUE DATE

May 17, 2024

DEPAUL UNIVERSITY CONTACT

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TABLE OF CONTENTS

I. INTRODUCTION.....3
II. GENERAL INFORMATION.....3
III. STATEMENT OF NEED.....3
IV. PROPOSAL PROCESS AND CONTENT REQUIREMENTS6
V. EVALUATION OF SUBMISSIONS AND NEGOTIATIONS 11
VI. TERMS & CONDITIONS 12

APPENDICES B AND C ARE INCLUDED AS SEPARATE ATTACHMENTS.

PLEASE NOTE

Companies may not communicate with any University staff or related third-parties regarding this RFP other than the University contact. Doing so may result in immediate rejection of that company from the process.

I. INTRODUCTION

The intent of this Request for Proposal (RFP) is to identify a qualified vendor who offers an integrated workplace management system (IWMS) to comprehensively manage data related to DePaul University's built environment and grounds. DePaul seeks information about integration of the IWMS with existing software and any third-party solutions or implementation partners that would need to be procured to meet the University's needs.

Interested vendors must submit a letter of intent to participate via email to jsiege13@depaul.edu no later than 5:00 PM CST on May 10, 2024. Vendors who fail to submit this letter will not receive further consideration.

Proposals must be received electronically via email by the University no later than May 17, 2024 at 5:00pm CST. Proposals must be sent directly to jsiege13@depaul.edu.

This RFP contains DePaul University's confidential and proprietary information. The information contained herein may not be shared with third parties, nor used for any purpose other than that contemplated by the RFP.

II. GENERAL INFORMATION

DePaul University is a private higher education institution located in Chicago. Since its founding in 1898, the University has remained dedicated to making education accessible to all, with special attention to including underserved and underrepresented communities. In addition to being the largest Catholic university in the United States, DePaul is also the ninth largest private, not-for-profit university in the nation. DePaul's total enrollment in 2023 was 21,348 and featured the largest freshman class in university history.

DePaul recognizes the importance of supplier diversity and supports the development, utilization, and economic growth of certified Minority, Women and Veteran owned businesses. The university provides a fair and equal opportunity to provision goods and services and employs practices which conform to both the spirit and the letter of all laws against discrimination based on race, creed, color, sex, gender, sexual orientation, ability, age, national origin, or religion.

III. STATEMENT OF NEED

DePaul currently utilizes a variety of software for space-related functions. The University lacks a single system to efficiently manage its space. In many cases, its disparate systems do not communicate with each other or with Oracle, the University's enterprise finance, human resources, and student information platform. This technology gap drives the need to procure a synthesized space management solution. An IWMS will fundamentally transform how DePaul collects, distributes, analyzes, and reports on its space data, enabling the University to enhance its operational space management practices and strategic space planning initiatives for the benefit of its students, faculty, staff, and community.

DePaul currently uses the following platforms for space-related functions:

Facilities Work Order System: Metastorm
Space Management and Planning: AutoCAD
Space Allocation: PeopleSoft and Microsoft Excel
Academic Classroom Scheduling: 25Live
Cost Allocation: Microsoft Access
Events Management: 25Live and EMS
Access Control: Transact
Housing Room Assignments: StarRez
Financial Reporting and Human Resources Enterprise System: Oracle Cloud
Student Information System: PeopleSoft

The University operates multiple campuses—Lincoln Park, the Loop, Cinespace, and online—where tracking departmental space allocations, along with quarterly classes, events, and meetings, is necessary. The Lincoln Park Campus covers 40 acres with 3 million square feet, and the Loop Campus features six buildings totaling 1.7 million square feet. The Cinespace Studios campus provides 60,000 square feet dedicated to professional film and television production. Additionally, DePaul offers a range of online degrees and continuing education programs. DePaul has a variety of space types that need to be tracked, including classrooms, labs, student housing, retail, athletics, offices, and public areas.

DePaul has adopted a hybrid work environment, enabling faculty and staff to work remotely. While some faculty and staff have dedicated offices, many administrative departments utilize hoteling offices to enable staff to work on campus as needed. The University envisions this hybrid model as a long-term component of its workforce strategy. The dynamic information from the IWMS modules is imperative to our Public Safety, Human Resources, and Information Services teams to understand real-time space occupancy.

DePaul's Facility Operations ("FO") team leads all aspects of the University's space planning and day-to-day facilities management operations. This team works together with other departments to ensure a safe, efficient, and welcoming environment for students, faculty, and staff. The IWMS system will be principally leveraged by the FO team, and other departments will employ the IWMS for specific data and functions.

DePaul is seeking proposals from vendors who offer an integrated workplace management system to comprehensively manage data related to DePaul University's built environment and grounds. The University anticipates a phased implementation and seeks vendor guidance regarding the most logical phasing plan based on software specifications. The University is looking for vendor implementation team with the capacity to assist with project management throughout the implementation process. If a vendor recommends working with an implementation partner for its software platform, please include information about that partner in your proposal.

Anticipated Project Phasing

Phase 0

- **Data Cleaning, Validation, and Preparation**

DePaul is procuring an IWMS to efficiently and effectively manage its space data for strategic and operational purposes. As a critical first step in this project, the University will work with the selected vendor to collect space data from departments across the institution who use point solutions. A key goal of this phase is to establish a baseline understanding of how much space each academic and administrative department occupies.

Phase 1

- **Space Management**

The most urgent implementation priority for DePaul is space planning and management. The IWMS will track, monitor, and report on existing space at DePaul, providing architects and other third-party consultants with critical information to support master planning initiatives, departmental test fits, relocations, and programmatic space renovations. The essential items to track include the amount of space (square footage), location, type of space, users and "owners" of the space, and any modifications to these factors. These elements are crucial for our academic, facilities, finance, human resources, public safety, and real estate teams and will be imperative for the success of the in-design master plan.

Phase 2

- **Maintenance and Operations**

An IWMS will enable cost allocation of maintenance and operating costs; designation of work orders as billable or nonbillable; automated cost allocation and chargeback of billable work orders; user-friendly initiation, approval, assignment, and tracking of work orders; automation of preventive maintenance scheduling and assignments; and integration of facility and mechanical equipment condition data with preventive maintenance budgeting and project scheduling.

- **Workplace Services**

This includes classroom scheduling, conference room reservations, event management, concierge services, and tracking staff workstation assignments. The IWMS will communicate seamlessly with existing software systems that will continue to serve these functions, or IWMS modules will directly handle these functions as the implementation project progresses.

- **Capital Projects**

DePaul is seeking an IWMS solution with project management features that support the planning, execution, status and assignments of capital projects. Additionally, it should integrate information from various modules within the IWMS database to optimize long-term capital project budgeting and planning.

Phase 3

- **Energy and Sustainability**
DePaul is developing a new Climate Action Plan to augment existing sustainability initiatives. An IWMS will help the University use energy consumption and building systems data to deploy resources most effectively in support of existing and future sustainability programs.
- **Environmental Health and Safety and Risk Management**
The selected IWMS will allow storage of vendor contracts and certificates of insurance, with the ability to connect these documents to specific maintenance and capital projects. It will also facilitate development of safety inspection checklists for laboratories and other facilities to ensure compliance with University policies and federal, state, and local regulations. The system may also include capabilities for incident reporting and investigation, storage of safety data sheets, and tracking faculty and staff safety and OSHA compliance training.
- **Real Estate Lease Administration and Accounting**
A real estate module will facilitate lease accounting, rent roll reporting, lease abstract reporting, and retrieval of floor plans, all of which will integrate with existing software systems to enable an automated exchange of information between platforms.

Detailed information regarding DePaul's requirements for IWMS software functions is included in Appendix B, Software Functionality List.

IV. PROPOSAL PROCESS AND CONTENT REQUIREMENTS

Proposals should be prepared simply and economically, offering a straightforward, concise description of the capabilities needed to meet the requirements of the RFP. Emphasis should be placed on completeness and clarity of content. Responses should be organized as described below. A PDF of the complete proposal must be sent to the email address listed in Section II. If the file is too large, it may be divided into separate emails or transferred electronically through an online file-sharing service.

All respondents are encouraged to be creative and innovative in responding to this RFP. Please discuss any creative products, services, pricing, and partnerships you can provide. Describe alternate approaches to the requested services where feasible or additional services offered or recommended, which may not be specifically requested but of benefit to the University. The University reserves the right to consider other ideas and solutions, or only a restricted subset of this document.

Proposal Terms: The proposals submitted must remain in effect for a minimum period of 120 days after the closing date to allow time for evaluation, approval, and award of the contract. All information provided will be kept confidential. Please review the attached Terms and Conditions referenced below in Section VI.

Proposal Format: Responses must follow the same order of this RFP, listing the questions below followed by your company's response. The total response should not exceed 50 pages (not including any appendices).

Any information of a confidential or proprietary nature contained in a vendor response should be clearly marked 'PROPRIETARY' or 'CONFIDENTIAL' by item or at the top of each page. Reasonable precautions will be taken to safeguard any part of the response identified by a vendor as being confidential or proprietary.

Content: A vendor's proposal must fully address the following content:

Cover Letter: The letter should designate the proposing respondent's name and address and the representative through whom any negotiations would be conducted. The letter should be signed and dated by an authorized representative of the vendor. No pricing information should be included in this section.

Table of Contents: The table of contents should follow the RFP format.

Company Profile: Please respond to the following sections:

- A. **Overview** – General overview of the organization, customer service philosophy, and location of the primary office that the University will be assigned.
- B. **Experience** – Describe your company's direct experience in servicing not-for-profit educational sector clients.
- C. **Account Representative** – Describe who will be the primary point of contact for the University. Include their role and responsibilities, relevant credentials and experience.
- D. **Implementation Account Representative** – Describe who will be the primary point of contact for the University if your proposal is accepted and the software service is to be implemented. Include their role and responsibilities, relevant credentials and implementation experience.
- E. **Customer Growth Rate** – Provide a general overview of your customer growth rate over the last 5 years across all business lines.

References: Please provide three references that are of similar size to the University, preferably other private, urban, or large universities that have undertaken projects of similar scope. Include the following information for each reference:

- A. Name of College/University
- B. Contact Name & Title
- C. Telephone Number
- D. Email Address
- E. Number of Years as Customer
- F. Brief Description of Services Utilized

Contracted Services Scope & Pricing:

- A. **Scope** – Describe the products/services you are proposing. Include all software options that will be provided as part of the agreement. Additionally include any internal and/or third-party integrations that will be included or made available for a separate fee.
- B. **Products & Services** – Complete the attached Software Functionality List (Appendix B).
- C. **Pricing & Fees** –
 - a. Complete the attached Cost Proposal Form (Appendix C).
 - b. For the past 5 years, what has been the average price change for your software product each year (percentage change)?
 - c. Does your company offer special discounts for which DePaul University would be eligible (Higher Education, Non-Profit, etc.)? If so, please describe those discounts.
 - d. What are additional implementation costs not directly associated to IWMS implementation, but required for successful use of the product by clients of a similar size?
- D. **Implementation Support** –
 - a. Please briefly describe your implementation and onboarding approach.
 - b. Please describe your approach to project staffing for an implementation this size.
 - c. What key resources would DePaul need to dedicate?
 - d. How long does the typical implementation take with clients of similar size and project scope, inclusive of testing and training? Specify if onboarding will occur virtually or on-site.
- E. **Reporting**
 - a. Provide a list of standard reports provided within the software.
 - b. What is the process for creating and/or requesting custom reports?
- F. **Technical Support**
 - a. What technical support services do you offer? What are the channels (phone, email, chat, etc.) and what are the hours of operation for each?
 - b. How often are software revisions and updates released? What is the process of communication and deployment of those revisions/updates?

Information Services (IS) & Data Security:

A. Application Overview

- a. Please provide documentation of an independent audit opinion such as a SOC2 or other type of review.
- b. Does this application store, process or transmit credit card numbers? If so, is the application PCI-DSS compliant? Please provide documentation on the application's PCI-DSS compliance.
- c. Describe the cyber-insurance coverage in place for the application.
- d. Does your application store, process or capture biometric data?

B. Vendor Overview

- a. Has the vendor suffered a data breach in the last five years? If so, please describe the circumstances and the mitigations put in place afterward.
- b. Do you have a dedicated Information Security staff or office?
- c. Do you have a business continuity plan?
- d. Do you have a disaster recovery plan?
- e. Do you have an incident response plan?

C. Application Security Architecture

- a. Describe the processes for user logon authentication to the application – Does the application support SAML 2.0 based Single-Sign-On (SSO) for authentication (integration with Microsoft Azure Active Directory is strongly preferred)?
- b. If you don't use SSO, do you have an application password policy (including password aging requirements and password complexity requirements?)
- c. Does the application support Multi-Factor Authentication (MFA)? MFA for administrative users and for end-user accounts having access to significant amounts of data is required and is highly recommended for all other users.
- d. Describe application roles available to delegate access controls? Roles should be defined based on the principle of least privilege. Identify the privileges assigned to each role.
- e. Describe the process for managing user accounts within the system.
- f. Describe the method for encryption of client-to-server transmission (TLS, IPSEC, VPN, etc.).

- g. Describe the method for encryption of data stored on servers. What data is encrypted? Are backups encrypted? If removable media is used, is it encrypted? If email is used, is it encrypted?
- h. Describe how encryption keys are managed and protected?
- i. Describe the use of hashing functions and are hashes salted?
- j. Describe how credentials (cookies, certificates, user's password databases, etc.) are stored and encrypted on servers, databases and devices.
- k. Are security focused audit logs available to the institution that include AT LEAST all the following: login, logout, actions performed, timestamp and source IP address?
- l. Does the vendor staff (or third party) have access to Institutional data (e.g., financial, PHI or other sensitive information) within the application/system?
- m. Does the vendor company manage the physical data center where the institution's data will reside?
- n. Will institution data be shared with or hosted by any other third parties? (e.g., any entity not wholly owned by your company is considered a third-party)
- o. Document what data elements will be collected, created, received, hosted, transmitted or otherwise managed by this application. Include the name and the description of the data element.
- p. What formats are supported for importing data? What formats are supported for exporting data?
- q. Provide a data flow diagram. Include all system components and interfaces and integrations to other applications both hosted and within our data center. Include documentation of how data will flow between systems.

Business Practices & Summary: The selected vendor must be a financially stable and well-respected company within the industry as well as have experience in the higher education market. The selected vendor must also meet the criteria listed in the [University's Vendor and Contractor Selection Philosophy](#).

A. Financial

- a. Provide your organization's most recent annual report. If this information is available online, a link to the relevant reports will suffice.
- b. Provide your organization's bond rating (Moody's, Standard & Poor's and/or Fitch), if applicable. List any current corporate and class-action lawsuits in which your organization is named a defendant.

- c. Does your organization foresee any difficulties in the future related to core operations, future growth, innovation, etc.?

B. Minority, Women, & Veteran Owned Businesses

- a. Is your organization certified as being a woman, minority, veteran, or other historically underutilized company (HUB)? If so, provide a copy of the certification with your response.
- b. Describe any diversity hiring, sourcing or other initiatives in place with your company. Provide specific figures whenever possible.

C. Sustainability

- a. Provide links to websites that highlight your company's commitment to sustainability (corporate statement on sustainability, press releases on specific initiatives, etc.).

V. EVALUATION OF SUBMISSIONS AND NEGOTIATIONS

All proposals submitted will be reviewed by a selection committee consisting of DePaul University employees. At the completion of the proposal review, the committee may elect to invite the top scoring Respondents to make presentations virtually or in University offices at DePaul, at no cost to the University.

Based on the presentations and offers, the committee will select the proposal which best fulfills the University's requirements. The University will negotiate with the winning Respondent to determine final pricing and contract form. **As a private institution, there will be no public opening and reading of bids.** Overall responsiveness to the Request for Proposals (RFP) is an important factor in the evaluation process.

Proposals will be evaluated on the basis of:

- Ability to offer a superior tool, and ease of use.
- Reliability and quality of customer service, technical support and implementation services.
- Competitive pricing.
- Ability to provide integrated reporting, real-time analytics and data tools that enhance efficiency of operations and customer relationship management.
- Implementation timeline.
- Professional qualifications and experience of assigned team on similar projects.
- Company's financial strength and stability.
- Company's record of innovation and growth in the industry.

Following is the detailed schedule of events for this RFP. The University reserves the right to modify the below schedule.

Activity	Date(s)
Request for Proposal Issued	May 3, 2024
Question & Answer Period ¹	May 3 – May 10, 2024
Letter of Intent to Participate Due	May 10, 2024
Proposals Due	May 17, 2024
Evaluation & Vendor Meetings	May 20 – July 3, 2024
Contract Negotiations & Award	July 10, 2024
Contract Commencement	August 1, 2024

¹ All questions and answers will be shared with other Bidders.

VI. TERMS & CONDITIONS

The following terms and conditions govern the submission and evaluation of proposals and the award of a contract. Companies are requested to carefully review the terms and conditions of this RFP, as in some form they will likely become part of any subsequent agreement and award. The terms and conditions herein are not exclusive, and the terms and conditions of any final contract that may result will likely include but are not limited to the terms and conditions of this RFP.

- 1. Proposal Inquiry:** All questions and inquiries regarding this document should be submitted via email to the University contact listed on the first page of this document. Questions regarding this RFP must be submitted within the proposal timeframe in Section V. Questions asked after the deadline shown in the schedule in Section VI will not be answered.

Companies may not communicate with University staff or related third-parties regarding this RFP other than the University contact unless written consent has been provided by the University contact. Doing so may result in immediate rejection of that Company from the process.

- 2. Proposal Submission:** Proposals must be sent in the format outlined in Section IV. The responses must be **received** by the due date/time stated in Section V. Fax or telephone proposals will not be accepted. Proposals submitted must be sent to the email address listed in section I.
- 3. Proposal Review/Rejection:** The University reserves the right to reject any or all proposals received, to request clarification of any proposal, to waive informalities or irregularities; and to award a contract not based solely on the lowest cost but based on an offer which, in the sole opinion of the University, best fulfills or exceeds the requirements of this RFP and is deemed in the best interest of the University. Firms whose proposals are not accepted shall be notified after a binding contractual agreement between the University and the selected bidder exists or after the University has rejected all proposals.

4. **Effective Period of Proposals:** The proposal submitted by the Company must remain open and irrevocable for a minimum period of 120 days after the closing date to allow time for evaluation, approval, and award of the contract.
5. **Withdrawal/Modification of Proposals:** Unless mutually agreed upon in writing between the University Contact and the bidder, a proposal shall not be modified, withdrawn, or canceled by the bidder for a period of 120 days following the date and time assigned for the receipt of proposals. Prior to the time and date assigned for receipt, proposals submitted early shall be modified or withdrawn only by written notice to the University.
6. **Contract Termination for Cause:** The University may terminate any resulting contract for cause if the contractor fails to cure any default within thirty (30) days after having received written notice of said default from the University.
7. **Contract Assignment or Subcontract:** The resulting contract shall not be assigned, transferred, delegated, or sublet in whole or in part without the prior written approval of the University.
8. **Supplier:** The University reserves the right to approach suppliers who may not be specifically related to this RFP for additional business and/or partnership programs.
9. **License:** The resulting contract will not grant the contractor a license or other right to duplicate or use any mark, image, or intellectual property of the University in any manner other than as may be expressly approved in writing in connection with the performance of the contract.
10. **Compliance with Laws and Regulations:** The contractor shall keep fully informed of and shall faithfully observe all laws, national and state, and all ordinances and regulations affecting responsibility to the University, or affecting the rights of contractor's employees, and the contractor shall defend and indemnify the University, its officers, and agents against any claims of liability arising from or based on any violation thereof.
11. **OSHA Compliance:** All items to be furnished hereunder shall meet all applicable State and Federal requirements of the Occupational Safety and Health Act. All alleged violations and deviations from said state and federal regulations or standards of the items or services to be furnished hereunder, must be set forth on the proposed requirements and criteria in the proposal response. Or, if at any later date the items or services contained herein shall not meet all applicable state and federal requirements after the Company is awarded the contract hereunder, the Company must notify the University's Director of Procurement Services immediately by registered mail.
12. **Indemnity Agreement:** To the fullest extent permitted by law, Company shall, during and after the term of any resulting Agreement, indemnify, defend, and hold harmless DePaul and its trustees, directors, officers, faculty, employees, affiliates, and agents, past or present, against all losses, claims, demands, actions, causes of action, suits, liabilities, damages, expenses, fees and costs (including but not limited to reasonable fees and costs for attorneys, witnesses, professionals, alternative dispute resolution and courts) arising out of or relating to any actual or alleged: (i) personal injury or property damage arising out of or related to the performance of any resulting Agreement; (ii) misrepresentation, breach of warranty, or breach of covenant or

other promise by Company of any representation, warranty, covenant or other promise in any resulting Agreement; and (iii) infringement by Company of any third party's patent, trademark or copyright, or misappropriation of any third party's trade secret. Company shall choose and employ counsel reasonably acceptable to DePaul, and DePaul shall have the right to participate in the defense of any action or legal representation to which this indemnification provision applies. Company shall not compromise or settle any claim covered by the indemnification provision without DePaul's consent.

- 13. Insurance Requirement:** The contractor shall cause a Certificate of Insurance to be issued naming the University as an additional insured. The Certificate of Insurance must be received and approved before commencement of operations. The contractor must maintain the insurance for the duration of the project or the term for which the services will be rendered. The certificate must evidence coverage as required by the University.
- 14. Equal Employment Opportunity Requirements:** The contractor shall not discriminate against any employee or applicant for employment because of race, color, ethnicity, religion, sex, sexual orientation, national origin, age, marital status, physical or mental disability, parental status, housing status, source of income or military status, or any other group protected by law, including federal, state, and local equal employment opportunity laws.
- 15. Requested Information:** The University will not pay for any information requested herein, nor is it liable for any costs incurred by the participant in responding to this request. All proposals submitted become the property of the University; they will not be returned.
- 16. Binding Information:** None of the information released either verbally or in writing shall be deemed binding to the University in any manner.
- 17. Participant Terms:** The University will not enter into any agreement or execute any contract or affix signature to any document from a participant whose terms, written or verbal, require the University to waive all conditions or requirements negotiated, provided for in this document, our purchase order, or by mutual consent. Any document containing a clause or clauses that serve to supersede all other documents attached to this transaction may be rejected.
- 18. Contracting:** Your response to this RFP constitutes an offer to do business with DePaul University under (at a minimum) the terms, conditions and pricing collectively gathered by this process. In the event a contract is awarded, the University, at its option, may incorporate all or parts of your response in that contract. Any or all answers and information contained within your proposal shall become part of the final agreement between you and the University.
- 19. Signatures:** All proposals or offers must be signed by a duly appointed officer or agent of your company.
- 20. Additional Provisions:** Notwithstanding any other provision of this Request for Proposal, the University expressly reserves the right to:
 - a. Conduct discussions with any or all participants for the purpose of clarification of proposals;
 - b. Waive, or decline to waive, any insignificant defect or informality in any proposal or proposal procedures;

- c.** Accept, reject, or negotiate the terms of any proposal, or any parts thereof, for the purpose of obtaining the best and final offer;
- d.** Reissue this Request for Information;
- e.** Cancel this Request for Information;
- f.** Issue a Request for Proposal;
- g.** Select the finalist(s) based on the University's analysis and evaluation of proposals submitted. The University reserves the right to request presentations of proposals if the University feels further information is appropriate to the decision-making process;
- h.** Negotiate with any or all of the participant's representatives for the purpose of obtaining best and final offers. However, proposals will be evaluated on the assumption that the proposed costs/revenues are your most favorable.

**APPENDIX A
NON-COLLUSIVE CERTIFICATE**

By submission of this document, each person signing certifies, and in the case of a joint submittal, each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief:

1. The content of this request has been arrived at independently without collusion, consultation, communications, or agreement for the purpose of restricting competition as to any matter relating to service or cost with any other vendor(s) or with any competitor;
2. No attempt has been made or will be made by vendor to include any other person, partnership or corporation to submit or not to submit a response for the purpose of restricting competition and;
3. No employee, agent or consultant of DePaul University has received or will receive any payment or any other form of compensation from vendor as a result of award of an agreement or promise of award to vendor.

Authorized Name: _____

Authorized Signature: _____

Title: _____

Company: _____

Date: _____

DEPAUL UNIVERSITY				VENDOR RESPONSES	
ITEM	REQUIREMENTS	IMPLEMENTATION PRIORITY (1-3)	FUNCTIONAL DESCRIPTION	PLEASE SELECT WHETHER FUNCTION IS AVAILABLE OUT OF BOX OR REQUIRES CONFIGURATION, CUSTOMIZATION, IS AVAILABLE VIA THIRD-PARTY APPLICATION, OR IS NOT AVAILABLE.	VENDOR NOTES
1	Report on different levels of ADA accessibility to Academic Affairs, Events Management, and other user groups who reserve space.	1	Space Management		
2	Store floor plans that can show different layers of data (space measurements, utilities, space program, mechanical/electrical/plumbing, etc).	1	Space Management		
3	Share partial or complete floor plans with internal and external stakeholders.	1	Space Management		
4	Track space data for remote campuses (e.g. study abroad programs).	1	Space Management		
5	Data visualization tools to enable analysis and forecasting using data in Oracle PeopleSoft and IWMS system.	1	Space Management		
6	Import and export data to/from AutoCAD in a bidirectional manner.	1	Space Management		
7	Add, save, print, and view CAD drawings outside of AutoCAD (e.g. in browser, PDF, and other formats).	1	Space Management		
8	Generate dynamic reports that combine multiple floors or buildings into one report for space utilization analysis.	1	Space Management		
9	Integrate data from PeopleSoft, Oracle Cloud and IWMS to generate reports in Tableau.	1	Space Management		
10	Track and report cost to operate each building and calculate space-related operating costs for each department.	1	Space Management		
11	Track and report on all assets and attributes of a space, including audiovisual systems technology, information technology, furniture, seating capacity, and other user-defined attributes.	1	Space Management		
12	Create space surveys for academic and administrative departments to update space data including, but not limited to, occupants, room types, and research grants within parameters and set by Facility Operations administrator.	1	Space Management		
13	Track space measurements/square footage utilizing a variety of parameters and standards, including gross, net, rentable, usable, BOMA, and other University-defined categories.	1	Space Management		
14	Track space assignment/allocations by organizational department and commercial tenant.	1	Space Management		
15	Track asset classes including buildings, landspace, hardscape, parking lots, antennae, and utilities.	1	Space Management		
16	Ability to query space area, use, and departmental allocation/assignment from drawings and report graphically in a drawing that displays the result of the query.	1	Space Management		
17	Utilizes existing drawings to add space and asset information in additional layers and polylines and communicates bidirectionally between IWMS and AutoCAD.	1	Space Management		
18	Ability to accumulate cost by space.	1	Space Management		
19	Space classification by use, including classroom, laboratory, office, mechanical/electrical/plumbing/telecommunications, and other University-defined categories.	1	Space Management		
20	Manage reservations for all types of space, including but not limited to classrooms, conference rooms, teleconference ("Zoom") rooms, and other spaces for academic classes, internal and external meetings and events.	2	Workplace Services		
21	Assign different levels of administrative and viewing rights to various user groups (Academic Affairs/Registrar, Events Management, Facility Operations, Student Organizations) to manage space scheduling.	2	Workplace Services		
22	Space data dynamically integrates with classroom and event reservation capabilities so users who are making space reservations can see room availability, capacity, IT amenities, and photographs of each space.	2	Workplace Services		
23	Visitor management capabilities to include faculty and staff ability to inform Public Safety of guests who are expected and the ability of Public Safety personnel to register and track guest arrivals.	2	Workplace Services		
24	Block off days on which the University is closed to prevent events from being scheduled.	2	Workplace Services		
25	Track and report on space utilization, including peak use times and peak availability.	2	Workplace Services		
26	Ability to build an optimizer which saves different subject codes' preferences and requirements and then allows the ability to optimize the remaining classes automatically each quarter based on these saved preferences.	2	Workplace Services		
27	Ability for different users to have different security groups and settings based on SSO from Campus Connect/PeopleSoft.	2	Workplace Services		
28	Ability to develop an API that connects reservations for rooms and offices with ID swipe entry directly to the EMPLID in the reservation for automatic access to FAM.	2	Workplace Services		
29	Ability to allow internal notes within the classes and events where staff can keep track of different notations (i.e. why a specific room was assigned or if staff are waiting on further information from faculty). These notes would be visible to Academic Affairs/Registrar staff and not to faculty.	2	Workplace Services		
30	Ability for event requestors to attach documents when needed (speaker approval forms).	2	Workplace Services		
31	Ability to import class data from PeopleSoft along with the ability to overwrite the location assignments in PeopleSoft based on the scheduling assignments in 25Live.	2	Workplace Services		
32	Ability to create very customized searches for locations, classes, instructors, events etc.	2	Workplace Services		
33	Ability to bind instructors teaching back-to-back classes together so we can assign them to the same room or floor.	2	Workplace Services		
34	Track and store contracts, invoices, and certificates of insurance for vendors and tenants.	2	Maintenance and Operations		
35	Generate reports showing when COIs must be renewed.	2	Maintenance and Operations		
36	Assign rights to request keys to authorized staff.	2	Maintenance and Operations		
37	Store and report on mechanical equipment condition.	2	Maintenance and Operations		
38	Schedule and assign preventive maintenance work.	2	Maintenance and Operations		
39	Store and report on building hours to Public Safety, Academic Affairs, and other user groups.	2	Maintenance and Operations		
40	Dynamically assign and schedule one or more work orders for preventive maintenance, including multiple work orders for different components of mechanical equipment.	2	Maintenance and Operations		
41	Perform predictive maintenance analysis.	2	Maintenance and Operations		
42	Assign tasks to multiple shops, multiple employees within a shop, and to third-party contractors who are authorized to perform maintenance work.	2	Maintenance and Operations		
43	Enter facilities maintenance work order requests.	2	Maintenance and Operations		
44	Report on faculty, staff, and student whereabouts within buildings for emergency incident response purposes.	2	Maintenance and Operations		
45	Charge back internal departments and commercial tenants for work orders.	2	Maintenance and Operations		
46	Approve, decline, reprioritize, and assign work order requests to maintenance staff.	2	Maintenance and Operations		
47	Generate space condition assessment checklists and report on space conditions using data collected from inspections.	2	Capital Projects and Planning		
48	Automated processes and workflows.	2	Capital Projects and Planning		
49	Track and report on progress of capital projects.	2	Capital Projects and Planning		
50	Move management capability and visual space planning tools.	2	Capital Projects and Planning		
51	Store and report on qualitative and quantitative commercial lease data.	3	Real Estate		
52	Generate lease abstracts.	3	Real Estate		
53	Generate rent roll reports and lease revenue financial forecasts.	3	Real Estate		
54	Hazardous materials management.	3	Environmental Health and Safety/Risk Management		
55	Report on building energy efficiency using real-time building automation system data.	3	Energy and Sustainability		
56	Measure building energy consumption via integrated software solution.	3	Energy and Sustainability		
57	Assign different levels of viewability and data modification rights to individual users and user groups for space plans, stacking plans, floor plans, and other space data.	Foundational Requirement for All Modules	Configuration and User Experience		
58	Assign rights to request keys to authorized staff.	Foundational Requirement for All Modules	Configuration and User Experience		
59	User-defined reports and dashboards throughout all modules.	Foundational Requirement for All Modules	Configuration and User Experience		

58	Component systems, modules, and enterprise-wide data are linked by a common model or database.	Foundational Requirement for All Modules	Configuration and User Experience		
59	Software platform must be 100% cloud-based.	Foundational Requirement for All Modules	Configuration and User Experience		
60	Provides a user-friendly experience regardless of device, operating system, browser, or application, and is compatible with all common desktop and mobile operating systems.	Foundational Requirement for All Modules	Configuration and User Experience		
61	Automated, bidirectional communication between AutoCAD, Oracle, and IWMS for efficient space management workflow. This includes real-time communication between systems, enabling users to rapidly access the most current data.	Foundational Requirement for All Modules	Configuration and User Experience		

Appendix C - Cost Proposal Form

Instructions:

Complete the Cost Summary below, which shall be a roll-up of all subsequent Cost Detail sections. Cost Summary shall represent the full cost of software, implementation, and other services for a five (5) year term. The timing of all costs should match Respondent's implementation plan.

Complete the Cost Detail sections, which shall include unit pricing and total costs as applicable. In case of a discrepancy between the unit and total pricing, the unit price(s) shall govern. Please add items as needed/proposed.

In Cost Detail sections, if costing is available by module or in other levels of granularity, please provide that detail.

Description of Cost Structure	
<i>In general terms, please describe your cost structure (per user, per module, etc.)</i>	

Cost Summary						
Item	Cost Year 1	Cost Year 2	Cost Year 3	Cost Year 4	Cost Year 5	Total Cost
1 Annual license or subscription costs (include maintenance)						
2 Additional/optional product costs						
3 Implementation services costs detail						
4 Training costs						
5 Other costs						
TOTAL						

1 Annual Subscription Costs Detail						
Item	Cost Year 1	Cost Year 2	Cost Year 3	Cost Year 4	Cost Year 5	Total Cost
a Primary software licenses or subscription (include maintenance)						
b Third-party software licenses or subscription (e.g. Integration Tools / Middleware; list each application separately)						
TOTAL						

2 Additional/Optional Product Costs						
Item	Cost Year 1	Cost Year 2	Cost Year 3	Cost Year 4	Cost Year 5	Total Cost
a						
b						
c						
TOTAL						

3 Implementation Services Costs Detail					
Item	Quantity	Unit Cost	Total	NOTES	
a Project Manager					
b System Integration Development					
c Configuration, Testing and Acceptance					
d Data Migration					
e Implementation Partner					
TOTAL					

4 Training Costs Details						
Item	Cost Year 1	Cost Year 2	Cost Year 3	Cost Year 4	Cost Year 5	Total Cost
a						
b						
c						
TOTAL						

5 Other Costs Details						
Item	Cost Year 1	Cost Year 2	Cost Year 3	Cost Year 4	Cost Year 5	Total Cost
a						
b						
c						
TOTAL						