THE UNIVERSITY OF NORTHERN IOWA
CEDAR FALLS, IA

Request for Proposal #Q9449
Capital Projects & Construction Management System
(Cloud Based)

Procurement Services
University of Northern Iowa
103 Gilchrist Hall
Cedar Falls, IA  50614-0008
Email: jon.westhoff@uni.edu
RFP #Q9449

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Please note: an electronic version of this Request for Proposal can be downloaded from:
http://www.vpaf.uni.edu/obo/purchasing/rfq_display.shtml

<table>
<thead>
<tr>
<th>SCHEDULE OF ACTIVITIES:</th>
<th>TIMELINE</th>
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<td>(All times are in Central Standard time)</td>
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<tr>
<td>RFP Posted</td>
<td>September 30, 2020</td>
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<tr>
<td>Written Inquiry Deadline</td>
<td>October 13, 2020 at 3:00PM</td>
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<tr>
<td>Responses to Written Inquiries Published</td>
<td>As soon after October 13, 2020 as possible</td>
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<tr>
<td>Proposal Submission Deadline</td>
<td>October 28, 2020 at 3:00 PM</td>
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<tr>
<td>Presentations (if needed)</td>
<td>Tentatively anticipated to be sometime during the Week of November 16, 2020</td>
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Section I
Proposal Instructions and Conditions

1.1 General
The University of Northern Iowa (also referred to as “University” or “UNI”) is interested in acquiring the services Capital Projects & Construction Management System (Cloud Based).

1.2 Description of the University of Northern Iowa
The University of Northern Iowa, located in Cedar Falls, was founded in 1876. Today, the campus covers 915 acres and consists of five colleges: Business Administration, Education, Social and Behavioral Sciences; Humanities Arts and Sciences; and Graduate College. Approximately 13,000 undergraduate and graduate students are currently enrolled.

1.3 University Representative
All questions and comments in reference to this Request for Proposal must be directed to:

Jon Westhoff
Purchasing Agent
122 Lang Hall
University of Northern Iowa
Cedar Falls, Iowa 50614-0003
Telephone (319)273-6246
jon.westhoff@uni.edu

1.4 Each Vendor, by submitting a proposal, acknowledges its representatives have:

1.4.1 Read and completely understood the proposed Contract Documents contained in this RFP. The Contract Documents shall consist of this RFP (Proposal Instructions and Conditions, Terms and Conditions of the Contract, Scope of Work, Form of Proposal, and all attachments); any subsequent Addenda issued by UNI, Bidders response to this RFP, and any contractual agreement that may result from this RFP.

1.4.2 Based their proposal upon the requirements described in the proposed Contract Documents.

1.5 Receipt and Opening of Proposals

1.5.1 Proposals are to be submitted in an envelope, box, or package labeled “RFP Q9449; Capital Projects & Construction Management System (Cloud Based)”. Proposals must be received by Procurement Services, 103 Gilchrist Hall, Cedar Falls, Iowa 50614-0003, by 3:00 P.M., CST, on October 28, 2020. Any proposal received after the time specified for the receipt of proposals may not be considered and may be returned unopened to the sender as non-responsive.

One (1) original and one (1) electronic copy of the proposal are to be submitted to Purchasing Services in response to this RFP.

1.5.2 UNI reserves the right to accept or reject any or all proposals and to waive any irregularities, technicalities, or informalities in proposals if such waiver does not substantially change the offer or
provide an unfair competitive advantage to any Company. UNI reserves the right to request additional documents or proposal clarifications after the due date and time for proposal submission.

1.5.3 No proposals submitted by use of oral, telephonic, telegraphic, or facsimile methods, nor any modifications to previously submitted proposals made by any of these methods, will be considered. If a proposal is sent by mail, Company should make allowance for the time required for such transmission.

1.5.4 Company's legally authorized representative (Officer of Company) shall sign the proposal. The official name, address, telephone, and fax number and e-mail addresses are to be stated on the proposal form.

1.5.5 No responsibility will be attached to any person for premature opening of a proposal not properly identified.

1.5.6 The laws of the State of Iowa require the contents of all proposals be placed in the public domain and be open to inspection by interested parties. Proposals will be available for public viewing after a contract has been finalized with the awarded Company. Trade secrets or proprietary information that are recognized as such and are protected by law may be withheld, if clearly identified as such in the proposal. Proposals marked entirely confidential or proprietary may be rejected. Pricing information, management fees, financial arrangements, and other offers cannot be considered proprietary information.

Failure to list all proprietary sections of the submitted proposal in the space provided on the Form of Proposal, shall relieve UNI personnel from any responsibility, should such information be viewed by the public, a competitor, or be in any way released.

1.5.7 All opened proposals become the property of UNI and will not be returned to the proposer.

1.6 Prerogatives of the University

This solicitation does not commit the University to award a contract or to pay any costs incurred in the preparation of a proposal and submission of proposals, costs incurred in making necessary studies for the preparation of proposals, or any travel or personnel expenses associated with trips to UNI. The University reserves the right to accept or reject any or all proposals received; to negotiate with any qualified respondent or respondents; or to cancel, in part or in its entirety, this RFP.

1.7 Addenda

Any and all interpretations, corrections, revisions, and amendments shall be issued by UNI Purchasing Services to all known holders of proposed Contract Documents in the form of written addenda. Except for addenda modifying the proposal due date or canceling the Request for Proposal, such addenda shall be issued so as to be received at least three (3) days prior to the time set for receipt of proposals. All addenda so issued shall become part of the Contract Documents and shall be acknowledged in the Form of Proposal.

1.8 Qualification of Company

1.8.1 UNI shall make such investigations as deemed necessary to determine the ability of Company to provide the expected services.

1.8.2 UNI reserves the right to reject any proposal if the evidence submitted by, or investigation of, such Company fails to satisfy UNI that said Company is properly qualified to carry out the obligations specified herein.
1.8.3 UNI reserves the right to award based on the proposal(s) determined to be in its best interest.

1.9 Firm Selection

Selection of a Firm will be done through an evaluation of responses to this RFP #Q9449. A committee will complete the evaluation, considering written responses to the RFP and any subsequent clarifications requested by UNI’s evaluation team in selecting the Company it wishes to retain as its Firm. UNI and the selected Firm may enter into negotiations to reach a mutually acceptable agreement. Should UNI and the Company be unable to negotiate a mutually acceptable agreement in a timely manner, UNI reserves the right to select another Firm and enter into negotiations with that Company.

1.10 Exceptions to Contract Documents

Company shall clearly state in the submitted proposal any exceptions to, or deviations from, the Scope of Work of Section III, and any exceptions to the provisions, terms, and conditions of this RFP included in Section I and Terms and Conditions of the Contract in Section II. Such exceptions or deviations will be considered in evaluating the proposals. Any exceptions should be noted on Attachment A and returned with the submitted proposal. Companies are cautioned that exceptions taken to this RFP may cause their proposal to be rejected at the sole discretion of UNI. Exceptions not stated on Attachment A will have no effect.

1.11 Preference Laws

UNI will give preference to purchasing from Iowa based businesses if the proposals submitted are comparable in pricing and their ability to meet all other evaluation criteria, when compared with proposals submitted by other Companies.

1.12 Gratuities

The laws of the State of Iowa provide that it is a criminal offense to offer, promise, or give anything of value or benefit to a state employee with the intent to influence that employee’s acts, opinion, judgment or exercise of discretion with respect to that employee’s duties.

1.13 Proposal Evaluation

All proposals submitted in response to this RFP will be reviewed for responsiveness by the purchasing agent prior to referral to the evaluation committee. A committee will then evaluate all responsive proposals in accordance with the criteria described below.

The contract will be awarded to the vendor whose overall offer is deemed to be the most advantageous to the University as determined by the evaluation committee. In preparing responses, offerors should describe in great detail how they propose to meet the specifications detailed in this RFP.

The Evaluation Criteria utilized for this Request for Proposal will be based upon, but not limited to, the following criteria which are listed in no particular order:

1.13.1 Cost of services
1.13.2 Ability of software to meet University needs
1.13.3 Ability to meet project timetables
1.13.4 Experience and Capability of the firm
1.13.5 Work Samples

1.14 Issuing Office
The Purchasing Agent listed herein is to be the **SOLE** point of contact concerning this RFP. Offerors shall not directly contact other personnel regarding matters concerning this RFP or to arrange meetings related to such.

1.15 **Inquiries**

Prospective offerors may make written inquiries by mail, e-mail or fax before the written deadline concerning this RFP to obtain clarification of requirements. No inquiries will be accepted after the deadline. Responses to inquiries will be posted as addenda to the University’s Purchasing Webpage in a timely matter.
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Section II

Terms and Conditions of the Contract

The following terms and conditions will apply to any contractual agreement awarded as a result of this RFP.

2.0 Terms

2.0.1 The University

The University is the University of Northern Iowa. The term University means the University or the University's authorized representative. The University may be referred to as “University” or “UNI”.

2.0.2 The Company

The Company is the person or organization to which the University will issue a contractual agreement, when/if award of this Request for Proposal is made. The term Company means the Company or the Company's authorized representative.

2.0.3 The Work

The Work comprises the services and expenses required by the Contract Documents to carry out the contract.

2.0.4 The Agreement

The Agreement refers to the contractual agreement between UNI and the awarded Company, detailed in the contract documents and signed by both parties, and incorporating the RFP and Company’s response by reference. The agreement may be referred to as “Contract” or “Agreement”.

2.0.5 Contract Documents

The Contract Documents shall consist of this RFP (Proposal Instructions and Conditions, Terms and Conditions of the Contract, Scope of Work, Proposal Content, Form of Proposal, and all attachments), any subsequent Addenda Issued by UNI, Bidders response to this RFP, and any contractual agreement that results from this RFP.

2.1 Non-appropriation of Funds

Notwithstanding other provisions of any award resulting from this RFP, if funds anticipated for the fulfillment of this agreement are at any time not forthcoming or insufficient, either through the failure of the Iowa Legislature or the federal government to provide funds or the program under which funds were provided is altered, then UNI shall have the right to terminate this agreement without penalty by giving not less than thirty (30) days written notice documenting the lack of funding or program change.

2.2 Immunity from Liability

Every person who is a party to this Agreement is hereby notified and agrees that UNI, and its agents, successors, and assigns are immune from liability and suit for or from Company's activities involving third parties and arising from this Agreement.
2.3 **Indemnification**

2.3.1 To the fullest extent permitted by law, Company shall defend, indemnify, and hold harmless UNI, its agents, successors, and assigns, the Board of Regents, State of Iowa, and the State of Iowa from and against all claims, damages, losses, and expenses, including but not limited to attorneys’ fees, arising out of or resulting from the performance and compliance with the terms and obligations of the Agreement, provided that any such claim, damage, loss, or expense (1) is attributable to bodily injury, sickness, disease, or death, or to injury to or destruction of tangible property, including the loss of use resulting there from, and (2) is caused in whole or in part by any negligent act or omission of Company, its subcontractor, or anyone directly or indirectly employed by any of them or anyone for whose acts any of them may be liable, regardless of whether or not is caused in part by a party indemnified hereunder. Such obligation shall not be construed to negate, abridge, or otherwise reduce any other right or obligation of indemnity which would otherwise exist as to any party or person.

2.3.2 In any and all claims against UNI, its agents, successors, and assigns, the Board of Regents, State of Iowa, and the State of Iowa by any employee of Company, and subcontractors, anyone directly or indirectly employed by any of them or anyone for whose acts any of them may be liable, the indemnification obligation shall not be limited in any way by any definition or boundary on the amount or type of damages, compensation or benefits payable by or for Company or any subcontractor under workers’ compensation acts, disability benefit acts or other employee benefit acts.

2.4 **Code of Fair Practice**

The Company shall not discriminate against any employee or applicant for employment because of race, creed, color, religion, national origin, sex, sexual orientation, age, disability, veteran status, or any other basis where protected by law, except where it relates to a bona fide occupational qualification. In the event of the Company’s noncompliance with this clause or with any related federal or state regulations, this contract may be canceled, terminated or suspended in whole or in part and the Company may be declared ineligible for further contracts with the Board of Regents, State of Iowa.

2.5 **Subcontractors**

Company is specifically advised that any person, firm, or other party to whom it is proposed to award a subcontract under this Agreement must be approved in advance, in writing, and be acceptable to UNI. The Company is responsible for all acts of its subcontractors, as well as, the subcontractors’ performance of delegated duties. Company shall be solely responsible for payment to all subcontractors or secondary suppliers that the Company may engage for the completion of any contractual agreement with UNI.

2.6 **Insurance**

Company shall purchase and maintain, throughout the term of this Agreement, comprehensive general liability insurance, including contractual liability, slip and fall coverage and comprehensive automobile liability insurance to protect Company from all claims for bodily injury, including accidental death, personal injury, and property damage arising from operations under this Agreement, whether such operations be by Company, subcontractor, agent, or by anyone else directly or indirectly employed by Company. In addition, Company shall purchase and maintain errors and omissions insurance to protect UNI from any losses associated with Company’s acts. All statutory insurance requirements, including worker’s compensation, shall be met. All required insurance policies shall be issued by reputable insurance companies duly authorized to engage in the insurance business in the State of Iowa. Limits of such insurance shall be as stated below:

- Worker’s Compensation - Statutory
- Comprehensive General Liability - $1,000,000 each occurrence*
Commercial Auto Liability - $1,000,000 each occurrence*
Errors and Omissions - $1,000,000 each occurrence*
*$2 Million aggregate

The State of Iowa, the University of Northern Iowa, and the Board of Regents, State of Iowa, shall be named on such policies as additional insureds. Failure to maintain insurance coverage throughout the life of any resulting contract, consistent with the provisions of this Section, shall be considered a breach of contract. As evidence of the above, the Company will submit certificates of insurance on an annual basis. The certificates shall also provide that should the policy be cancelled or materially changed, thirty (30) day written notice prior to the effective date for the change or cancellation, shall be given directly to UNI.

Company agrees to waive all rights of subrogation against UNI, the State of Iowa, the Board of Regents, State of Iowa, the Regent institutions, their employees and agents for any claim filed against Company or other firms associated with the Agreement.

2.7 Amendments to the Agreement

When awarded, the Agreement shall not be changed, modified, altered, or amended in any respect without the mutual consent of the parties hereto, which consent shall be evidenced by a written amendment to the Agreement executed by both parties.

2.8 Laws

Terms and provisions of this Agreement shall be construed in accordance with the laws of the State of Iowa, and any and all litigation or actions commenced in connection with this Agreement shall be instituted in the appropriate courts in the State of Iowa.

2.9 Assignment

The award of this RFP may not be assigned, transferred, sold or subcontracted by Company without the prior written consent of UNI. Should selected Company be purchased (in whole or in part) by another organization or should Company wish to assign, transfer, or subcontract the Agreement to another Company, UNI shall have the right to terminate the Agreement upon written notification, without penalty to UNI.

2.10 Advertising

Company shall not use or reference the name of University of Northern Iowa as a part of any commercial advertising without prior written approval of UNI's central administration and its Trademark and Licensing Office.

2.11 Taxes

UNI is exempt from State and Local Sales and Use Taxes on the services. A Tax Exemption Certificate will be furnished upon request.

2.12 Access to Company Records/Audits

The Company agrees to keep and provide full access to all records that pertain to UNI throughout the period that the Agreement remains in effect and for a minimum of seven (7) years after the Agreement is terminated, unless required to retain for a longer period by state or federal statute.
2.13 **Termination**

2.13.1 If Company is adjudged bankrupt or makes a general assignment for the benefit of creditors, if a receiver is appointed on account of Company's insolvency, if Company repeatedly refuses or fails to supply enough employees, management staff, or equipment to adequately provide timely delivery or services for UNI, or if Company is otherwise guilty of a substantial violation of the Contract Documents, UNI may terminate the Agreement after giving Company a minimum thirty (30) days written notice, without penalty to UNI.

2.13.2 In any case where Company has failed to provide equipment and services or has provided nonconforming equipment and services, UNI shall provide a Cure Notice. If after notice Company continues to be in default, UNI may procure services from another source and terminate the Agreement, without penalty to UNI. Company may be required to pay UNI the difference if a higher cost firm is selected.

2.14 **Severability of the Agreement**

In the event any one or more of the provisions contained herein shall for any reason be held to be invalid, illegal or unenforceable in any respect, such invalidity, illegality, or unenforceability shall not affect any other provision, but shall be construed as if such invalid, illegal, or unenforceable provision had never been contained. Further, in the event that any provision shall be held to be unenforceable by virtue of its scope, but may be made enforceable by a limitation thereof, such provision shall be deemed to be amended to the minimum extent necessary to render it enforceable under the laws of the jurisdiction in which enforcement is sought.

2.15 **Open Competition**

2.15.1 Where, in these contract documents, reference is made to materials, trade names, catalog numbers or articles of certain manufacture, it is done for the purpose of establishing a basis of comparative quality, type or style and not for the purpose of limiting competition. It shall be understood that such method of description is not intended to exclude other items, processes, similar designs, or kinds of materials, but is intended merely as a means of establishing a standard of comparison. Other manufacturing processes may be used, if, in the opinion of UNI, they are acceptable in serviceability, durability, quality, functional capabilities and design.

2.15.2 UNI reserves the right to reject any substitute article or material, and/or the associated bid which, in UNI's opinion, does not meet the standard of quality established by such a reference in the contract documents.

2.15.3 Companies offering other than the items specified shall submit, with their bid, catalog cuts, brochures, and detailed specifications covering the items on which they are bidding. In addition, include samples of paint, laminate chair frame finishes and standard fabrics. **Any deviation from the contract documents contained in this bid shall be noted by the company on the Bid Compliance Form. (See Attachment A.)** Where the company proposes to substitute an article or material, the company shall be prepared to submit samples, upon request, for UNI's inspection. The cost of transportation, both ways, of such samples shall be borne by the company.

2.15.4 The company is expected to comply fully with the contract documents in this bid solicitation. In the event the company's materials or equipment do not conform, and those deviations have not been stated on the Bid Compliance Form, the company will be responsible for furnishing materials and equipment, which fully conform at no change in their bid price.
2.16 Guarantee-

In filling this order, Company warrants and guarantees to University that the articles are in compliance with sections 5 and 12 of the Federal Trade Commission Act; the Fair Packaging and Labeling Act; the Federal Food, Drug and Cosmetic Act; the Consumer Product Safety Act; the Federal Insecticide, Fungicide and Rodenticide Act; the Federal Hazards and Substance Act; the Fair Labor Standards Act; the Wool Products Labeling Act; the Flammable Fabrics Act; the Occupational Safety and Health Act; and the Federal Anti-Kickback Enforcement Act; Debarment and Suspension policies (E.O.s 1249 and 12689); Contract Work Hours and Safety Standards Act (40 U.S.C. 327-333); Rights to Inventions Made Under a Contract or Agreement in accordance with 37 CFR part 401; Byrd Anti-Lobbying Amendment (31 U.S.C. 1352) Clean Air Act (42 U.S.C. 7401 et seq.) and the Federal Water Pollution Control Act (33 U.S.C. 1251 et seq.), as amended; Davis-Bacon Act, as amended (40 U.S.C. 276a to a-7); Buy American Act.

2.17 Export Control-

Company acknowledges that a foreign national(s) may use the device/technology/and or data you propose, at the University. Company shall comply with all U.S. export controls laws and regulations, including but not limited to the International Traffic in Arms Regulations (ITAR), 22 CFR Parts 120 through 130, and the Export Administration Regulations (EAR), 15 CFR Parts 730 through 799, in the performance of this Agreement. In the absence of available license exemptions/exceptions, Company shall be responsible for obtaining the appropriate licenses or other authorizations, if required, for exports of hardware, technical data, and software, or for the provision of technical assistance. Company shall be responsible for all regulatory record keeping requirements associated with the use of licenses and license exemptions/exceptions. Company shall be responsible for obtaining the appropriate licenses or other authorizations, if required, for exports of hardware, technical data, and software, or for the provision of technical assistance. Company shall be responsible for all regulatory record keeping requirements associated with the use of licenses and license exemptions/exceptions. Prior to disclosing or transferring to University any hardware, technical data, software or product utilizing any such data which is subject to export controls under federal law, Company shall notify the University in writing of the nature and extent of the export control. The University shall have the right to decline any such technical data or product utilizing such data. In the event Company sends any such technical data or product that is subject to export control, without notice of the applicability of such export control, the University has the right to immediately terminate the Agreement.

2.18 Energy Star Purchases-

Whenever possible, UNI will purchase equipment that is rated energy efficient by this joint program of the U.S. Environmental Protection Agency and the U.S. Department of Energy.

2.19 Hazardous Material-

All packaging, transportation and handling of hazardous materials shall be in accordance with applicable federal and state regulations including, but not limited to, the Material Safety Data Sheet provision of O.S.H.A. Hazard Communication Standard 29 CFR 1910.1200, and Iowa Administrative Code, Section 530.

2.20 Clean Air and Water Certification –

Company certifies by filling this order that its facility is not on the Environmental Protection Agency (EPA) List of Violating Facilities. Company will immediately notify University Purchasing Services of the receipt of any communication indicating that any company’s facilities are under consideration to be listed on the EPA List of Violating Facilities.
2.21 **Federal Subcontract** –

If this agreement constitutes a sub agreement under a prime contract with a federal agency, the terms and conditions of the prime contract shall prevail.

2.22 **Vendor Code of Conduct** –

University of Northern Iowa is committed to socially and environmentally responsible purchasing consistent with the values in our strategic plan. The University of Northern Iowa expects high quality in the products, services and business practices of all of its business partners. This commitment enjoys broad support on campus.

2.23 **Software Accessibility** –

Software solutions provided to the University of Northern Iowa shall be compliant with the standards of Federal statute Section 508 Amendment to the Rehabilitation Act of 1973 and W3C.org Web Content Accessibility Guidelines (WCAG 2.0 LevelAA) for accessibility for persons with disabilities for the minimum level of accessibility. Please review the links provided for specifics related to these referred to standards and guidelines. WCAG guidelines [www.w3.org/TR/WCAG20/](http://www.w3.org/TR/WCAG20/) and Section 508 [www.section508.gov](http://www.section508.gov). The University reserves the right to request that the Supplier provide audit and/or test results that document the software’s compliance and the testing methodology utilized.

If software is included in this quotation, please describe how the software meets the accessibility requirements included with Section 508 and WCAG 2.0 Level AA.
3.1 Overview

The University of Northern Iowa’s (UNI) Facilities Management is responsible for the physical development and operation of 91 buildings with net square footage of 2.94 million.

UNI Facilities Management has been using Accruent’s Facilities Asset Management Information System (FAMIS) for Capital Projects and Oracle’s Primavera Submittal Exchange for Construction Management.

UNI manages on average, 50 active Capital Projects annually with an average budgeted cost of $2.4 Million. On Average, 18 new Capital Projects are initiated annually with an average budgeted cost of $1.9 Million.

There are currently 28 primary users in the FAMIS Classic Capital Projects Module. Submittal Exchange is used by UNI power users (up to 20 on any given project) and allows for Design Professionals, Contractors and Subcontractors to access the system on a rights granted basis for communication and project management.

3.2 Capital Projects

The capital projects solution must include the functionality listed in the following attributes:

3.2.1 Ability to create Dashboards and Workbenches to create different views and filters.

3.2.2 Ability to assign and un-assign multiple different Managers to different phases of a Project.
   3.2.2.1 Project Managers are assigned for the Design Phase of a project.
   3.2.2.2 Construction Managers are assigned for the Construction Phase of a project.
   3.2.2.3 Other managers/employees/crews may be assigned to the project

3.2.3 Project Management Details
   3.2.3.1 Ability to gather project management information such as status, requester, description, start and due dates.

3.2.4 Ability to communicate with IWMS work orders.

3.2.5 Ability to identify Locations for a Project
   Location needs to be capable of being identified in the following attributes
   Site Examples:
   3.2.5.1 Campus
   3.2.5.2 Additional locations as needed.
   3.2.5.3 Building
   3.2.5.4 Floor
   3.2.5.5 Room

3.2.6 Ability to assign multiple locations to a project

3.2.7 Project Type Classifications
   3.2.7.1 Ability to allow for multiple project types with the ability to convert active projects to different types as they move through the life of the project.
3.2.8 Project Templates
3.2.8.1 Ability to create project templates and be able to modify project attributes as projects are in process.

3.2.9 Project Classification
3.2.9.1 Ability to use attributes to characterize and detail the type of work being assigned to a Project.

3.2.10 Mobile Capabilities

3.3 Capital Projects – Budgeting

3.3.1 Ability to create budgets

3.3.2 Ability to allow for multiple budget versions and version control during budget creation process.

3.3.3 Ability to lock a budget as final once approved and not allow for changes post-approval.

3.3.4 Ability to create columns for anticipated costs through all budget phases.

3.3.5 Ability to restrict permissions on changes/edits/revisions to budgets.

3.3.6 Ability to create and configure budget coding attributes for use in budget development. Budget Codes are used to divide up the overall budget into specific categories. Examples:
- Design Fees (1120)
- Material Testing (1230)
- Prime Contractor (2100)
- Landscaping (2130)
- Construction Costs Other (2160)
- Furniture & Equipment (3100)
- Contingency (5100)
- Various other codes as determined

3.3.7 Ability to summarize budget codes into pre-defined groupings. Example:
- A roll-up of specifically identified budget codes for the purposes of reporting.

3.3.8 Ability to create costing estimates and project costing summaries.

3.3.9 Ability to estimate costs across the entire project budget. Examples:
- Actual Costs
- Committed Costs
- Forecasted (Anticipated) Costs

3.3.10 Ability to provide a summary of all costs filtered by attributes or work orders.
3.3.11 Ability to create budget reports to assist assigned Managers with budget management and forecasting.
   Examples:
   - Budgeted vs Actual
   - Multiple budget views
   - Ability to add anticipated future costs

3.3.12 Ability to create public-facing websites displaying project cost information to campus customers

3.3.13 Ability to utilize multiple funding sources to fund a project budget
   Examples:
   - University General Fund
   - Private Donations
   - Department and College Funds

3.3.14 Ability to control the change order process during a Project.
   Example:
   - Ability to input proposal requests and add change orders to a project to demonstrate which proposal requests are pending and which change orders those proposal requests are assigned to. This gives an updated total budget for the project and updates the Contractor’s Contracts.
   - Ability to input amendments to keep updated totals within a Project or Design Professional Agreement.
   - Ability to display dollar amounts of proposal requests and interim directed changes (IDC’s) that are not yet captured in a change order.
   - Ability for approved proposal requests to be included in the committed cost for budget variance purposes.

3.3.15 Audit Changes to Budget.
   Ability to audit changes made to the budget and account number information.

3.3.16 Project Management Scheduling
   - Ability to create project schedules.
   - Ability to track task (work order) due dates & due dates by phase
   - Ability to visually view schedule (similar to Gantt chart)
   - Ability to export schedule
   - Ability to create schedule reports to assist assigned managers with management and forecasting
   - Ability to audit date changes

3.3.17 Project Milestone Schedules
   Ability to track proposed dates for project management including but not limited to:
   - Dates for approvals
   - Permission to proceed
   - Design schedule dates
   - Construction schedule dates
3.4 Construction Management

3.4.1 Ability for consultants / constructors / sub-constructors to publish/access documentation based on user level or user group permissions, limiting access to other project areas.

3.4.2 Ability to limit permissions to remove any documentation attached to workflows, workflow steps, actionable items logs, etc. to approved users or user groups.

3.4.3 Ability to permanently link documents from workflows to workflows, workflow steps, actionable items logs.

3.4.4 Ability to transmit direction via textural or attached documentation to contractual stakeholders with auditable receipt confirmation.

3.4.5 Ability to request direction via textural or attached documentation of contractual stakeholders with auditable receipt confirmations.

3.4.6 Ability to generate logs of actionable items. Examples:
- Project Observation Logs
- Commissioning Issues Logs
- Warranty Issues Logs
- Design Requests for Information

3.4.7 Ability to limit ability to respond, take action on or revise actionable items by user or user group permissions.

3.4.8 Ability to attach or permanently link documents to actionable items.

3.4.9 Ability to filter actionable items such as direction or requests for information by responsible party.

3.4.10 Ability to set due dates, standardized or customizable durations for actionable items.
- Submittal Review Logs
- Document Reviews
- Document Approvals
- Responses to Constructor or Consultant Requests for Information.

3.4.11 Ability to assign responsible users or user groups to actionable items.
3.4.12 Ability to highlight past due actionable items and associated responsible party.

3.4.13 Ability to generate searchable standalone PDF of any actionable item.

3.4.14 Ability to attach included action items documents and actionable item within a PDF package

3.4.15 Ability to download all document into an archived file.

3.5 Document Management & Storage Process

3.5.1 Third Party Access to Documents
Ability for approved contractors and consultants to have read/write access to documents. Access defined by named user access and assigned user roles and permissions within the system.
Examples of roles:
- Contracts
- Change Orders
- Drawings
- Pay Requests
- Submittals
- Punch Lists
- Meeting Minutes
- RFI's
- Purchase Requests
- Schedules

3.5.2 Documentation Editing/Revising
Ability to manage, view, edit, and revise project documentation.
Ability to view existing drawings (Plats) and campus maps from projects
Examples of project documents:
- Bid documents
- Award notices
- Photos
- Reference materials
- Addendums
- Manuals
- Payment requests
- Agreements
- Other documents as required by the project

3.5.3 Ability to send and receive communications from within the solution for all Project-specific communications.
This includes communications to internal users and users outside of the system through potential integration to email/Exchange, MS Teams, etc.
All communications to and from users outside of the system must be capable of being fully managed and responded by the internal system individuals through the system.
Example:
If a project manager sends a message from the system to another internal user and two external third party, the PM must be able to receive all responses within the system and be capable of responding to any of those responses, while keeping the entire chain of messages stored in the system.

3.5.4 Ability to review, route, and approve documentation electronically within the system.

3.5.5 The ability for routing hierarchy of shop drawings, PR's, etc.

3.5.6 Ability to store all project communications (email, text, MS Teams) for archiving.

3.6 Mobile Capabilities

3.6.1 Ability to review all current documentation, including current changes so that we have ongoing “as-built” drawings, on-site via mobile application (smart phone, tablet, 2-in-1 laptop, etc.)

3.6.2 Ability to process documents with mobile device. Add construction field observations and manipulate drawing.

3.6.3 Ability for a fully functioning mobile application (system functions converted to mobile, viewing abilities, communication, offline, etc.)

3.7 Report Builder

3.7.1 Ability to create and configure reports via drag and drop visualization builder

3.7.2 Ability for ad-hoc report building that includes breakdown of all data table property connections for building these reports.

3.7.3 Ability to preview report as it is being built.

3.7.4 Ability for all users to create custom reports and restrict custom reporting access by user permissions

3.8 User Administration

The following are user-related administration tools currently in use that have not been discussed elsewhere and are required functionality.

3.8.1 Ability to flexibly define user roles.
Allow for rules and permissions based access to certain tasks:
Example: Project permissions
- View
- Edit

Example: Billing Permissions
- Viewing Billing Information
- Editing Billing Information
- Creating Billing Invoices
3.8.2 Ability to manage access to different tabs via user permissions.

3.8.3 Ability to create unlimited users and unlimited access to the service.
   • Prefer not to have per-user or named user license fees for this service.

3.8.4 Ability for Administration and Management to grant and revoke role and permissions access for a user.

3.8.5 Ability to authenticate users through integration with Identity and Access Management Tools
   • UNI uses a custom system that manages what roles a user has in a system

3.9 Interfaces

3.9.2 Ability to interface with Meridian BlueCielo for as-built drawing viewing and completed project document storage

3.9.3 Integration to Oracle E Business Suite (bill processing, funding sources, etc.)

3.9.4 Integration with Bluebeam

3.9.5 Integrate to our Integrated Workplace Management System (IWMS)
It is important that responses contain enough information to permit UNI’s evaluation team to fully understand the Company’s capabilities. Proposals should address all items outlined in project expectations and should include anticipated time frames, cost, and suggestions for cost savings. UNI is requesting responses to this RFP that, at a minimum, include the following:

4.1 Attachment A
Attachment A completed and signed by your Company’s representative.

4.2 Cover Letter
Include a cover letter introducing your company and summarizing your qualifications.

4.3 References
Company is to submit a list of three higher education references for which they have performed similar work. Reference should include client name, address, phone number, work performed for client, date of work, and client contact. Included in Attachment A.

4.4 Marketing Materials
Company should include proposals for the specific projects. These materials should include but not limited to: functionality features.
Attach as Supplement 1.

4.5 Work Process
Provide work process examples and workflows.
Attach as Supplement 2.

4.6 Security Documents
Company should provide HECVAT & VPAT (Version 2.0 or higher, 2.4 is preferred. Please provide WCAG version if possible.
Attach as Supplement 3.

4.7 Timeline
Company should provide project timeline for delivery.
Attach as Supplement 4.

4.8 Fees
Company should provide a detailed quotation for the proposed compensation/fees for the work performed for UNI. Quotation to detail any module costs, hourly rates, license fees and other costs that provide background for fees detailed in Attachment A.
Attach as Supplement 5.