REQUEST FOR INFORMATION (RFI)

DRCI-16-2209

PREVENTATIVE MAINTENANCE OPTIMIZATION SYSTEM

RESPONSE DEADLINE:

RFI responses are due by to Noon, Local Time on
Tuesday, February 22, 2016

ADDRESS FOR RFI RESPONSES:

Ohio Department of Rehabilitation & Correction (ODRC)
Attn: Yolanda Cooks, Project Manager 1
Office of Acquisitions and Contract Compliance
770 West Broad Street
Columbus, Oh 43222

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1.0. INTRODUCTION

1.1 Purpose of this Request for Information (RFI)

The purpose of this RFI is to gather sufficient information to determine the procurement method and specifications for a preventative maintenance optimization system. As a continuously developing technology, the ODRC prefers to conduct a Request for Information (RFI) prior to conducting a Request for Proposal (RFP) or an Invitation to Bid (ITB) in order to procure a system to meet the needs of the ODRC.

All parties are encouraged to respond, regardless of whether they may respond to possible solicitation(s) subsequent to this RFI. You are encouraged to share this RFI with anyone you believe may be interested. We thank you, in advance, for your interest and participation.

Under no circumstances is this Request for Information to be construed as an invitation to bid, propose, quote or otherwise solicit business from the State, nor should this RFI be interpreted as a definitive list of requirements, strategies, direction, or commitment to the market pertaining to any current or future state preventative maintenance requirements. The exchange of information does not imply imminent purchase, nor should it in any way be construed as a commitment to purchase by the State, or encouragement to expend funds in development, marketing or sales to the State. The issuance of this RFI and any subsequent acceptance of market responses, whether in writing or orally and whether in whole or in part, does not bind or impose any legal obligation upon the State or Respondents in any way, nor does it limit the State's right to negotiate in its best interest with any Respondent at any time.

All materials submitted in response to this RFI will become the property of the State and may be returned only at the State's option, and at the prospective Respondents expense. The State routinely handles all information submitted in response to an RFI with care, uses it only for information evaluation purposes, and restricts access to the minimum number of persons who have a need to know. However, subject to any pre-existing Non-Disclosure Agreement between the State and Respondents, the State assumes no obligation and shall incur no liability regarding confidentiality of all, or any portion of a quotation, or any other material submitted in response to this RFI. If any prospective Respondent feels compelled to submit information considered proprietary or confidential, it is such Respondent's obligation to notify the State in advance of providing such information, specifying the nature of the material, and to obtain written authorization to proceed.

1.2 BACKGROUND

The planned/preventative maintenance scheduling system must allow users to setup recurring preventive maintenance activities such as estimated/actual time information, safety checkpoints, parts, materials, frequencies. This will allow *artemes* users the ability to efficiently schedule, track, and report on preventive maintenance activities.

2.0 REQUIREMENTS

Scheduled Maintenance Module: The system software must include the following:

- Track all scheduled maintenance
- Generate recurring maintenance schedules on a daily, weekly, monthly, quarterly or annual basis as necessary

- Track equipment information, including manufacturer, model, and serial, service dates, and warranty expirations
- Maintain the planned maintenance (PM) histories of assets and equipment for as long as five years
- Interface with work order module to automatically generate maintenance work orders
- Accommodate planned maintenance activities for specified dates, days of the week, the month, and specified seasons
- Generate overdue reports
- Provide detailed PM task specific job tracking
- Provide PM wizard set up
- Feature a PM template library as a one-stop update across multiple sets of PM's

Work Order Module

The system should have a work order component that will enable users to process preventative maintenance tasks and work orders. Including:

- Unlimited allowance of Work Order submissions via internet-based work request portal
- Internet accessibility through any device with web access
- Multiple levels of access based on set parameters
- Capability for setting completion deadlines and reporting back completion information to requestors
- Automated programmable workflow logic and assignments
- Work Order by type, trouble report or work order, and scope of work involved
- Assignments by a supervisor or automatically by facility
- Prioritization feature
- Recording capability of requestor's name, phone number, and email address
- Feature to track cost, labor hours, and material tracking
- Both standard and customized reporting features
- Available reporting with no additional charge for capability
- Employee name and/or identification number and work assignment
- Capability to submit work orders to contractors & vendors
- Request routed on-line to personnel authorized for review and approval
- Ability to work on requests from any facility with network capability
- Electronically route work orders
- Permit work order entries from multiple clients
- Capital Planning System

Capital Planning System

- Ability to create long-range capital plans
- Project based" estimating approaches as well as "asset modeling" in which deficient building components are identified for deferred maintenance
- Tools and reports to assist in justifying funding requests by tracking the cost of correcting deferred maintenance
- Allow for vendor estimates to be recorded as well as estimates based upon previous experience
- Allow for multiple approaches for resolving line items of capital plans
- Ability to create and use custom estimating tools
- Update the capital plan live with corrective costs from related work orders

- In work order process derived from capital plan items, identify the following: Completion dates, Estimated vs. Actual hours, Labor and Material transactions for each work order, Trade, Budget and other codes
- Simplify long-range planning for future capital needs
- Ability to easily generate customizable reports for analyzing capital impacts
- Build histories related to projects and items identified for resolution
- Forecast potential cost impacts of aging buildings, equipment and preventative maintenance neglect
- Show comparison of estimated costs of renovation vs. new construction of buildings
- Easily manage plans and associated budgets

Reports

The proposed system modules must provide all applicable standard reports. Provide samples of both standard reports and an example of custom reports. Describe the reporting capabilities of the system. Reports features must be made available with no additional charge.

- Reporting to be available in Excel and PDF format
- Automatic saved reports with capability to email automatically on a recurrence pattern

Training

Live, statewide training and support must be available by phone, online screen sharing, email, and chat.

Ability to add additional modules at a later date:

- Inventory Management System
- Critical Alarm Integration Module
- Utility Tracking Module
- Facility Resource Scheduling Module

Reports

The proposed solution(s) shall provide numerous pertinent, system-standard reports. Describe reporting capabilities, standard reports, and custom report capability including import/export formats.

Inventory Module

- Track all inventory transactions, including issues, receipts, returns, adjustments, orders, and transfers
- Allow inventory to be allocated to a location, project, work order, or employee
- Record receipt of inventory to pools, including item number, tax, supplier item ID, budget code, invoice, and PO number
- Automatically email requesters with confirmation receipts along with update alerts as the order status changes
- Allow material safety datasheets to be linked to inventory item records
- Integrate seamlessly with the work order and planned maintenance module to allocate expenses associated with maintenance requests
- Must integrate with a wireless device
- Must allow searching and sorting key inventory data such as returns, orders and

issues
- Must record inventory activity, such as depletions and arrivals from a handheld device
- Notify the user of min/max re-order points

Critical Alarm Integration

- Work order system should integrate with any BAS with the ability to communicate via email
- Automatically direct critical alarm messages from BAS to the work application
- Automatically escalate critical alarms not yet reviewed based on our preferences
- Automatically generates and populates work orders for BAS critical alarms
- Verifies responses to alarm notifications.

Utility Tracking System

- Organizing, tracking, benchmarking, analyzing, and reporting all commodities and costs related to energy consumed and purchased.
- Identifying ways it may reduce its utility consumption - leading to lower costs and promoting a more sustainable approach to continuing operations.

System Setup - The Contractor shall set up the organizational information in the system to include pertinent facility data including building name, location, square footage, and meter(s) per building. The Organization will provide the Contractor with a spreadsheet including, but not limited to the following basic information:

• Building name	• Building square footage
• Building address	• Building primary use
• Utility Vendor name	• Account number
• Meter number	• Commodity type
• Unit of measure	• Bill period start
• Bill period end	• Usage Cost
• Energy Usage Quantity	• Description

Historical Data Import **-** The Contractor will upload and populate the energy management software system with at least 24 months of historical utility data. The organization will provide at least 36 months of utility information (electric, water/sewer, natural gas, additional charges, etc.) to the Contractor in Excel format, including headings with the basic information listed above, shortly after contract execution. The data required in the billing history should include: account number, meter number, start date, end date, usage by meter, and cost by meter.

Training - Once the organization is setup with organization information and the 24 month history, the Contractor will perform training sessions for staff as to how to use the energy management software for ongoing bill entry and bill analysis. The Contractor shall provide training and support for all aspects of the software and its usage, including but not limited to functionality of the energy management software, data analysis and reporting, and importing of monthly utility bills.

Automated Upload to Portfolio Manager **-** All account, historic, and current data stored into the energy management software should automatically populate the Energy Star Portfolio Manager Software. The Contractor will be responsible for ensuring compatibility and auto-population of data from the energy management software into Energy Star Portfolio Manager.

Resource Scheduling Module

The facility scheduling system allows the facility and business office personnel to coordinate events and activities within the organization. The system will provide the a way to capture costs of event in order to better set rental rates and manage the facility usage policies as well as better coordinate the setup and coordinate efforts for the support personnel. The system supports multiple users including users at each facility. The system allows for personnel to request events, check for conflicts, and check the organization's calendar. Including:

- Multiple routing rules for event approval
- Email notifications to support personnel
- Database of areas available for usage
- Ability to handle events with multiple dates with a repeating pattern as well as random series of events
- Billing and rental administration
- Maintains rate tables and associates rates with facilities, customers and activity types
- Maintains a database of customers, to avoid having to reenter every time a rental is booked
- Facility reservation capability that includes rental dates, facilities, locations, activity (that the rental is being used for)
- Can associate a facility reservation with a customer
- Invoices can be generated on user defined timetables.
- Rental booking should include all charges as defined by user including custodial charges
- System-generated contracts.
- Historical information can be maintained on-line
- Ability for multiple, user defined reservation periods
- Can allocate revenue to specific facilities.
- Ability to generate queries and reports based on user-defined criteria, including usage and revenue statistics
- Can query rooms based on availability (i.e. available status)
- The software can store information such as dates, special setup details, manpower needs, reserved equipment, and associated work order numbers for scheduled events
- The software can record contact information for multiple contacts
- The software provides an appointment calendar
- Event planning and scheduling preparations
- The software can publish event plans to the Web for customer review.
- Multiple levels of security

Delivery

- No Server hardware to install or maintain
- Automatic Upgrades and Enhancements to Modules included
- High performance, multi-processor clustered database servers
- High performance load balanced web servers
- Redundant internal server power supplies
- Redundant, hot swappable hard drive array (RAID 1, 5, 10)
- Redundant high performance 10GBPS network
- Redundant high performance storage systems with Double Parity RAID 6 and global spare disks, preventing data loss when two drives fail.

- Redundant OC-12 thru OC-192 connections to top tier Internet providers
- Redundant backup power systems including 6.25 Megawatt N + 1 Generator Farm and N + 1 battery backup system
- 128-bit SSL encrypted management applications built to scale to multiple servers and databases
- Redundant server and application monitoring on two-minute intervals
- Daily backups of all system data replicated and restored to a disaster recovery data center
- Quarterly disaster recovery drills
- Hourly backups of appended data (data that has changed)
- 93% of application pages load in less than two seconds, with 99.5% loading in less than six seconds.
- Product quality rating of 99.6% or better on average
- Physical security monitoring 24x7x365
- IDS/Network security monitoring 24x7x365
- Application security by unique username and password
- Annual security audit by third party security consultants
- All systems run industry standard antivirus software that is monitored and updated daily
- Patch management process to evaluate, test, and apply patches as needed when released by vendors

3.0 CONDITIONS OF THE RFI

3.1 Sequence of Events

The RFI Manager will make every effort to adhere to the following schedule:

Action	Responsible Party	Effective Dates
1. Issue RFI	ODRC RFI Contact	Monday, February 1, 2016
2. Deadline for Questions	Potential Respondents	Thursday, February 18, 2016
3. Response Due Date	Respondents	Monday, February 22, 2016

3.2 Explanation of Events

3.2.1 This RFI is being issued on the date indicated in the Sequence of Events, above, by the ODRC.

3.2.2 Questions regarding this RFI must be submitted electronically, on the State Procurement Service's web site to the ODRC RFI Contact and must be received by Noon, Local Time on Tuesday, February 16, 2016. Questions may be submitted via the following method:

3.2.2.1 Offerors may make inquiries regarding this RFI any time during the inquiry period listed in the Calendar of Events. To make an inquiry, responders must use the following process:

1. Access the State Procurement Web site at http://www.ohio.gov/procure.
2. From the Navigation Bar on the left, select "Find It Fast".
3. Select "Doc/Bid/Schedule #" as the Type.

4. Enter the RFI Number found on Page 1 of the document. (RFI numbers begin with the letters ”RFI”)
5. Click “Find It Fast” button.
6. On the document information page, click “Submit Inquiry”.
7. Click the “Submit” button.

Responders submitting inquiries will receive an immediate acknowledgement that their inquiry has been received as well as an e-mail acknowledging receipt of the inquiry. Responders will not receive a personalized e-mail response to their question, nor will they receive notification when the question has been answered.

3.2.2.2 Offerors may view inquiries and responses using the following process:

1. Access the State Procurement Web site at http://www.ohio.gov/procure.
2. From the Navigation Bar on the left, select “Find It Fast”.
3. Select “Doc/Bid/Schedule #” as the Type.
4. Enter the RFI Number found on Page 1 of the document. (RFI numbers begin with the letters ”RFI”)
5. Click “Find It Fast” button.
6. On the document information page, click the “View Q & A” button to display all inquiries with responses submitted to date.

The State will try to respond to all inquiries within 48 hours of receipt. The State will not respond to any inquiries received after the inquiry end date & time.

3.2.3 The RFI response shall be delivered to:

Ohio Department of Rehabilitation and Correction
C/O Contracts: Yolanda Cooks
770 West Broad St.
Columbus, OH 43222

RFI responses are due by 12:00 p.m. Local Time on Monday, February 22, 2016. Responses received after the due date and time may not be considered. All responses should be labeled with the following RFI number: DRCI-16-2209.

3.3. General Requirements

Submission of a response constitutes acceptance of, and consent to, the following General Requirements:

1. This RFI in no manner obligates the state of Ohio or any of its agencies to the issuance of a RFP or any other action that may be described, implied or proposed.

2. This RFI and any subsequent RFP that may be issued by any other agency of the state of Ohio shall be governed by the laws of the state of Ohio.

3. All requests for clarifications should be directed to the State Procurement web site.

4. Only information supplied by “State Procurement Q & A “web site or in this RFI should be used in the preparation of responses.

5. Any cost incurred by the respondent in the preparation, transmittal or presentation of any response or material submitted in response to this RFI will be borne solely by the respondent.

6. The state of Ohio reserves all rights available to it by law. If a RFP or other type of solicitation results from this RFI, respondents to this RFI are hereby notified that all information, documentation, and any specific content or approaches included in RFI responses will be analyzed, may appear in various reports and may be used in the resulting solicitation. Therefore, do not submit any copyrighted, proprietary or confidential information. The state of Ohio cannot guarantee the confidentiality of the information submitted.

7. If the state of Ohio decides to issue an RFP or other form of solicitation, those parties who choose to respond to this RFI, as well as those parties who choose not to respond to this RFI, will be eligible to participate in that procurement.

8. Ownership of all data, material, and documentation originated and submitted to the state of Ohio, pursuant to the RFI, shall belong exclusively to the state of Ohio and be subject to public inspection in accordance with the ODRC public records request procedures.

4.0 RESPONSE FORMAT AND ORGANIZATION

4.1 One or Multiple Responses

For the sake of clarity, should a responder wish to submit multiple, diverse systems, they may prepare each response separately.

4.2 Response Format

Each respondent's response should include a cover letter identifying the submitting organization and the organization's point of contact. Responses should be typewritten on standard 8-1/2" x 11" paper and placed within a binder.

The response to this RFI should be organized in the following format:

1. The cover letter should be in the form of a standard business letter. The letter should also contain the following:

   a. A statement regarding the principal place of business.
   b. A list of the people who prepared the response, including their titles.
   c. The name, phone number, fax number, e-mail address and mailing address of a contact person who has authority to answer questions regarding the response.

2. Response to RFI Requirements as described in Section 5.0 RESPONSE REQUIREMENTS.

2. Other Supporting Materials/Documentation

Respondents may attach other materials that they believe may improve the quality of their responses.

4.3 Electronic Copy of Response

Respondents may include an electronic version of their narrative response in editable form. This can be provided on CD. MS Word (2010 or newer) format is preferred. Only a single copy of the electronic submittal is needed.

5.0 RESPONSE REQUIREMENTS

5.1 General Information

It is preferred that anyone responding to this RFI submit a Respondent Profile, as described below. However, a Vendor Profile is not required for submitting a response to this RFI.

5.2 Respondent Profile:

Subject to the limitations outlined in this RFI, Respondent shall summarize its experience in providing systems, similar in size, scope and complexity to the state of Ohio requirements outlined herein. An indication of the size, scope and complexity of the experience should be provided. This should include only the work done by the Respondent. The role of the Respondent (primary or sub-contractor) in their past work for the State (or direct benefit of the State) should also be identified.

5.3 General Responses Requested

Respondents are requested to address the preferred system features (see Section 2.0) in addition to general questions in this section. Additional supporting information may be provided as attachments to responses and may be referenced from the narrative response, as appropriate. Respondents are invited to provide additional information as they deem appropriate. Please identify by either the feature number listing in section 2.0 or the question number (e.g. 6.3.1), for each feature or each question you are addressing.

5.3.1 What is the recommended solution(s) you would suggest to meet our needs?

5.3.1.1 Does the recommended solution(s) fully comply with the preferred features listed in Section 2.0 Please explain how they system complies with each feature.

5.3.2 How is the solution(s) best deployed?

5.3.3 What is the level of effort that the DRC would need to provide in order to ensure the success of the solution implementation and on-going operations and maintenance?

5.3.5 What transition work would need to be considered to replace existing monitors and deploy the new solution?

5.3.6 What is your quality assurance/risk management plan for implementation, operation and on-going maintenance?

5.3.7 What should we look for in a training plan?

5.3.8 How much data storage is required for a full scale operation such as we have described? How are additional units added to storage?

5.3.9 What is a ballpark budget figure that you would recommend?

5.3.10 What didn't we ask that we should have? Please provide the answer/recommendation.