BEAVERTON
SCHOOL DISTRICT

March 1, 2021

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SOLICITATION ADDENDUM NO. 1
RFP 20-0012
Computerized Maintenance Management Software

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THE FOLLOWING CHANGES/ADDITIONS TO THE ABOVE CITED SOLICITATION ARE ANNOUNCED:

This Addendum modifies the Request For Proposal (RFP) document(s) only to the extent indicated herein. All other areas not changed or otherwise modified by this Addendum shall remain in full force and effect. This Addendum is hereby made an integral part of the RFP document. Proposers must be responsive to any requirements of this Addendum as if the requirements were set forth in the RFP. Failure to do so may result in Bid rejection. See the RFP regarding requests for clarification or change and protests of this Addendum, and the deadlines for the foregoing.

This addendum is to be acknowledged in the space provided on the Bidder Certification form supplied in the solicitation document. Failure to acknowledge receipt of this addendum may be cause to reject your offer.

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The closing date **HAS CHANGED TO: March 23, 2021 at 2:00 PM Pacific Time**

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CLARIFICATONS:

We are amending the timelines to the following:
a) **A go-live date, of October 1, 2021**
b) **The duration of each major phase of the implementation such as data mapping, conversion, design, customization/modifications of software, quality assurance testing, acceptance testing, training, and target go-live date.**
c) **User training and data transfer, July 1- September 2021**
d) **Requestor Training to start September 1, 2021**

Question: Did you receive any demo's previous to this solicitation?
Answer: **No, but demo's will be part of this process**

Question: What is your current system?
Answer: **Megamation**

Question: Are the school buses managed under a different system?
Answer: **Yes the school buses are managed under a different system. We do have fleet vehicles managed by us. We have no intention of combining our system with the Transportation department.**

Question: How many users?
Answer: **We have 60 facilities, each facility has up to 5 people who need to enter work orders. We also have about 90 people on the back end.**

Question: For adding more data integration? What would these systems be?
Answer: **PowerSchool Plus and integration to the CMMS, projects, inventory integration would be preferred.**

Question: Fuel. Are you looking to import your fuel transactions from your fuel distributor?
Answer: **It is not something we've talked about but it's something we may consider when looking at proposals.**

Question: User training and data transfer from April 2- June 4 with a go live date by July 1st. Is this correct?
Answer: **We are revising these dates, please see the clarification above.**

Question: For training, are you looking to do it closer to the go live date?
Answer: **System Administrators and those responsible for data transfer verification will need to be trained sufficiently earlier to accomplish data transfer verification to ensure a smooth transition. End users training should be closer to the go live date to ensure a smooth and complete implementation. Data migration is required.**

Question: **How extensive a data transfer** are you looking for in Migration? Work order history, a summary of costs?
Answer: **Our goal is zero down time between system change out. We need to have all active and open work orders pulled over. For old work orders we will have to determine the functionality and necessity to determine to what extent this is needed**

Question: When you mean down time, are you referring to 24/7?
Answer: **No, our working days/operating hours are 6am to 11pm.**

Question: Do you currently have an existing lock management system?
Answer: **We currently have a module, but it is not being fully utilized. We would like to see the functionality of what's available.**

Question: **Your organization does not place a high value on** legacy data?
Answer: **No, the work orders, projects and asset management are the areas requiring the most data migration.**

Question: Are you looking to change any of your business process or data collection? Are you looking to mimic and/or alter some things?
Answer: **Having it be familiar is preferred but since we have not taken this to the marketplace for over 10 years, demos are going to help us understand what is available.**

Question: So, your request to be able to Rename facilities and have changes cascade to all data would that be historic data as well? Archives as well?
Answer: **For example, we have Timberland Middle School, but the name has recently changed, so we need to be able to pull current and historical data through one name.**

Question: Will the asset ID be enough?
Answer: **If the asset ID contains a complete record.**

Question: In section 3, of the RFP item G, it says Additional specifications are detailed in Attachment A in the enclosures Section? There's an Attachment A in section 5? Am I missing the enclosures section?
Answer: **There is not an enclosures section, that was an error.**

Question: There are items referring to 2020, was that a typo and meant to be 2021?
Answer: **Yes, that was meant to be 2021.**

Question: In the contract terms there is a clause that refers to FERPA, I just want to confirm that there would not be any student data in the system?
Answer: **There would be no student information involved in this system,**

Question: All of the resources that would be dispatched are either employees or contractors with the District. Are there situations where a third-party resource would be utilized and/or dispatched? In regards to users.
Answer: **Beaverton School District can grant temporary SSO to these entities, so it is not needed in the CMMS system.**

Question: As far as system functionality, do you need something that's more granular, something that's open ended, does everyone really need access to everything or are you looking to fine tune what users have access to see and do?
Answer: **We would like the System Administrator to be able to define the specifics of user capability.**

Question: Regarding reporting, what are your expectations around the level of creating that data? Data query versus front end building reports and support?
Answer: **We are looking for more reporting availability and we want to see what pre-determined reports today's software can provide. The ability to customize is important to us because we want to be proactive and be able to respond to our leadership.**

Question: Is the District allowing Megamation to respond to the RFP and be evaluated?
Answer: **Yes, this solicitation is not based on dissatisfaction with our current vendor.**

Question:	What kind of use are you looking for? Are you looking to use the system on computers, mobile phones, iPads?
Answer:	**We need the ability to do both. Phones or tablets are typically used in the field so our technicians need to have a version in which they can view their queued-up work orders, and whether they are active or in need of attention. The Actual system use is typically done on laptop or desktop computers.**
Question:	Do you prefer mobile apps over mobile use?
Answer:	**Mobile apps would be preferred, but either is fine.**
Question:	Expenses. Are the costs tracked in the system?
Answer:	**Work orders and projects contain itemized costs, for future tracking and awareness. Hours and materials are tracked in work orders to make up overall cost. Expense modules would be more like life-cycle modules, and future planning modules, not necessarily specific work orders.**
Question:	Database reporting and Dashboards. Do you want the flexibility to add onto these reports and dashboard use without contacting the developing company?
Answer:	**It is helpful and preferable but not mandatory.**
Question:	About access to the system. You have people working from their desks and people working on their mobiles. Would you rather have the system accessible only through your own network? Or Public network?
Answer:	**The IT requirements are in the statement of work. There are firewall requirements listed.**
Question:	Do you use single sign on?
Answer:	**Yes, and compatibility is in the requirements.**
Question:	Is there a wrapper from for your mobile app? Can the mobile app be downloaded through the Apple Store or Play Store?
Answer:	**We have been able to download from the Apple Store or Play Store.**
Question:	Circling back to your Key Management solution. Is that a hardware solution or is it software only? We have tools that will self- dispense keys, like a locker box. When you have a touch screen kiosk you lock up and if you have the proper rights you punch in a code and unlock a door and it allows you to take a key. Then you can return it. Dispatching and returning of keys. Is that something of interest?
Answer:	**Being aware of it for future planning is great but currently software is our main concern.**
Question:	Can you share your anticipated budget?
Answer:	**Our current annual expense is approximately $27,000 a year.**
Question:	It is a funded project?
Answer:	**Yes.**
Question:	When you explain the cost of the system you are going to buy; would that also include the licensing cost of the system per user?
Answer:	**Yes, include the costs of licensing per user or group of users in your price schedule as well as your annual cost.**
Question:	Are you looking for other supporting data, Mysequal, ORACLE, to store archives and data?
Answer:	**There is no other software we need to talk to other than PowerSchool Business Plus. We need to upload from PowerSchool Business Plus.**
Question:	Is there a need or requirement to archive for a certain amount of time. Data storage requirements and archiving data after a period of time?
Answer:	**We would like to keep work order and projects information for the life of the District. If there is an archiving process inside of the software, we will need to be aware the feature and any cut-off date to maintain permanent access to the information.**
Question:	Is your current system externally hosted or held on District Servers?
Answer:	**It is externally hosted.**
Question:	Anyone responding to this should be providing a SaaS model? Including the incumbent?
Answer:	**Yes**
Question:	Call data stays CONUS, in the US?

Answer: **Our current system has one server in Canada. There are IT requirements concerning data location.**

Question: Invoicing process. You mentioned you would like the ability to print invoices to provide the schools for funds transfers, do you not have an ERP system that you interface to your financial accounting that's District-wide?

Answer: **There are occasions when we wish to generate an internal invoice that is less an A/P function than an accountability function. This functionality is not part of** PowerSchool Business Plus **and must be part of the CMMS system.**

Question: Would you need to track this to see if this invoice was paid? Or integrate it into the PowerSchool Business Plus system as a cost function?

Answer: **No.**

Question: Does this CMMS work independently from PowerSchool Business Plus?

Answer: **The CMMS works completely independently. We need a way to upload information from the PowerSchool Business Plus system into the CMMS system. Currently, a CSV file is uploaded from our business office to Megamation and they load it into each of the work orders that is affected. A work order number is put into purchasing system and when that CSV file comes, it's pushed into each work order, so the parts are represented.**

Question: What is the official name of the BSD financial system?

Answer: **PowerSchool Business Plus**

Question: Uploading and storage of attachments of files, photo's, documents. Is the expectation that those documents are to be maintained within this system? Or might they be stored on One Drive or SharePoint and accessed through the system?

Answer: **If there is an available integration with SharePoint, Office 365 or Google apps, it's something we can consider. Detail that in your response. Currently, those live in the Megamation system.**

Question: Do you have a preference?

Answer: **Convenience and ease-of-access will be considered in the overall evaluation of any purchased system.**

Question: Inventory management. Is there a central warehouse where items flow through or are there multiple facilities and staff?

Answer: **We use the inventory system from our Surplus furniture and Confidential documents storage. Along with some parts that are managed by our service technician that manages our vehicles. We have aspirational goals to move into a robust inventory system when it comes to maintenance parts. There are a minimal number of users in our inventory system.**

Question: Will IT permit the system to use the District's exchange server to send messages, notifications?

Answer: **The requirements provided by IT indicate that messages cannot come from anything that resembles an internal email. It needs to have its own provision for messaging.**

Question: Do you need the ability to customize the email messaging?

Answer: **That is a preference not a requirement - but if you have that ability, please detail it in your response.**

Question: How do you utilize asset data for Capital planning?

Answer: **We assess the physical elements in our buildings, a third of the district, each year. We have steps in our projects that consider elements in each building, generates a deferred maintenance list, and provides each element a score. We run reports based on the scores and update the long-term planning projects based on these scores.**

Question: For training are you requiring onsite training or if due to Covid-19, would online training be acceptable?

Answer: **Online training is acceptable if necessary, but on-site training is preferred.**

Question: The contract mentions ten additional one-year options, but I couldn't identify the first year or first term?

Answer: **The first term will be July 1, 2021 to June 30, 2022- One year base, nine additional one-year options at District's sole discretion.**

Question: Does the District provide employees mobile devices, tablets?

Answer: **Yes. We have a mix of Android and iPhones.**

Question: Any idea on the minimum operations support system on those devices?

Answer: **BSD ensures all devices have a current and updated operating system (Android and IOS support) within the last 2 years.**

Question: What do you think the percentage is between Android and IOS devices in the field?
Answer: **The majority out in the field is Android.**

Question: Do you have a business analytics team that would need to access the data for creating their own custom reports, dashboards or analytics?
Answer: **No.**

Question: Is there an updated implementation timeline? We are uncertain if this timeline is achievable:
   a) A go-live date, of July 1, 2020
   b) The duration of each major phase of the implementation such as data mapping, conversion, design, customization/modifications of software, quality assurance testing, acceptance testing, training, and target go-live date.
   c) User training and data transfer, April 2 through June 4, 2020
   d) Requestor Training to start June 7, 2020.
Answer: **PLEASE SEE CLARIFICATION NOTE ON PAGE 1 ABOVE - We are amending the timelines to the following:**
   e) **A go-live date, of October 1, 2021**
   f) **The duration of each major phase of the implementation such as data mapping, conversion, design, customization/modifications of software, quality assurance testing, acceptance testing, training, and target go-live date.**
   g) **User training and data transfer, July 1- September 2021**
   h) **Requestor Training to start September 1, 2021**

Question: How many users do you have for licensing? The following is a guide for the classed of users:

   Admin:
   - Setup & configure the software
   - Create & edit workflows
   - Create & edit user accounts
   - Assign rights
   - Import mass data

   Key User:
   - Create and edit objects:
   - (Locations, tickets, work orders, maintenance plans, contracts, CAD drawings, projects, stock, moves)

   Operational User
   - Create & edit work orders
   - Create & edit cleaning tasks
   - Run inspections (mobile)
   - Create an inventory (mobile)

   End User:
   - Book tickets
   - Make reservations
   - Explore space portfolio
   - Announce visitors

Answer: **Admin: 5 // Key User 25 // Operational User 55 // End User 300**

Question: Regarding **Section I – Introduction, 3. Features and Specifications**, is the District's expectation that respondents will treat this section as a 'matrix' and address the functionality outlined in the section point by point, or is this section informational only?
   a. If a matrix, is there a specific section of the requested format where the District wishes the response to go, or would the District prefer the responses to be their own section of the response?
Answer: **Please make sure your response indicates how these requirements are met by your system. It can be delivered in a matrix or a written narrative. The review committee will be looking for these details when narrowing down the responses.**

Question: How many Projects are you managing per year? At any one time? (By type: New Builds, Renovation, Retrofits)
Answer: **It really depends on the year. Right now, with social distancing requirements, we are not at full capacity. We have 80 actively managed projects right now. There are 2971 total projects in the system, starting in 2009. This team does not manage new build or major renovation. We typically manage school-funded upgrades, annual maintenance, deferred**

maintenance, regulatory compliance (asbestos, mold, ADA, IPM, USTs, Fire System work, etc.) and work that stretches beyond the capacity of our in-house maintenance trades.

Question:	How do projects typically get requested or identified?
Answer:	**School requested / funded projects are currently requested via a paper form submitted to maintenance. Annual, mandatory or maintenance-driven projects are created in the work order system project module. Projects are manually created by inside (Maintenance) system users. There is not currently a work-order type entry for school building users.**
Question:	Are project budgets defined prior to project approval? If so, how are they determined? Are cost codes or accounting codes used?
Answer:	**Project budgets for the work we do, are rarely clear before the project starts. Cost codes have not been historically used in our CMMS system. That is a function of our purchasing software, noted in the statement of work.**
Question:	Do groupings of projects roll up to a Program? Do projects have sub projects or child projects?
Answer:	**We do not currently use child projects at this time. We would be interested to see functionality if available.**
Question:	Do you track funding sources for projects, or is funding predetermined before a project begins? If so, do projects typically have more than one and vice versa?
Answer:	**We do not track funding sources in the CMMS system. That lives in our business/ purchasing software.**
Question:	Are you currently tracking Facility Condition Assessments on all 60 buildings?
Answer:	**Yes, in two different ways right now. Large assets are captured by a consultant. All other things that you can visually assess condition are currently housed in Megamation.**
Question:	Do you track barcoding on assets and inventory?
Answer:	**Not currently, but it is part of our future goals.**
Question:	Are your assets grouped into systems, components? If so, do you follow a standard naming device? Uniformat, CSI, etc.?
Answer:	**Yes, they are grouped into systems and labeled with uniformat coding.**
Question:	Do you depreciate your assets?
Answer:	**Not currently in the CMMS system, but that is goal in our future-state.**
Question:	Do you track both the purchase price and overall lifecycle and maintenance costs of your assets?
Answer:	**Not currently, but that is goal in our future-state.**
Question:	Do other systems like a building management system (BMS) feed tickets to your maintenance team automatically? If so, what BMS do you use?
Answer:	**We do not use a building management system. All functions, other than accounting/ purchasing live in Megamation.**
Question:	Do you use both internal shops and external vendors to perform the maintenance? If external vendors are involved, how are you invoiced for the work they do? Do they require access to the system?
Answer:	**We use internal trades staff and contractors. Contractors are managed by a project team member and do not access the CMMS system.**
Question:	Do you have service agreements and/or blanket purchase orders with your external vendors? If so, how are they managed?
Answer:	**We do, but they are not managed in our CMMS system.**
Question:	How are issues identified during an inspection then transmitted to the responsible shop or outside vendor?
Answer:	**Work orders are entered. If it is handled through internal trade technicians, the work order is issued to them. If it will be handled by an external contractor, the work order is assigned to a maintenance project coordinator to manage.**
Question:	Do you ever defer work? If so, what is your process and/or protocol?
Answer:	**Yes. There are two processes. 1. We use an "unfunded" status code to park but leave searchable in the work order system. 2. If it is identified through a Building Condition Assessment, it is captured as a step in our projects module, under the particular element.**
Question:	Do you monitor customer satisfaction for the work that your organization performs? If so, how do you monitor this? Do you send out surveys on completed work?
Answer:	**No.**

Question: Do you manage skills as part of the work management process?
Answer: **We are unclear as to the information being requested in this question.**

Question: Is Inventory Accounting used (Ex: LIFO or FIFO)?
Answer: **No**

Question: If you do track the procurement process, how is that done today? Do you require an integration to a financial system?
Answer: **This is covered in the statement of work and several previous questions.**

Question: What other systems (if any) are involved in the procurement process?
Answer: **This is covered in the statement of work and several previous questions.**

Question: Do you currently track hazardous materials and locations?
Answer: **We do, in a separate system, that is not planned to change. We would like to indicate this for facilities on work orders, if possible.**

-END of Addendum
Elizabeth Smith
Purchasing Agent