Request For Proposal

Facilities Project Management Software

RFP #16-608794-cs

Date Issued: 3/4/16

Due Date: 3/31/16

Submitted by the University of California
Davis Health System

This RFP is also available at:  http://www.ucdmc.ucdavis.edu/supplychain

All questions regarding this RFP should be by email only and directed to:

Connie Stewart
UCDHS Purchasing Department
Email: cjstewart@ucdavis.edu

Questions should not be directed to any other University departments or staff. Material or substantive information provided to any bidder, as a result of questions received, will be provided to all bidders via an addendum to this RFP.
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Proposed Schedule of Events

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<tr>
<td>Release of Request for Proposal</td>
<td>March 4, 2016</td>
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<tr>
<td>Receipt of Vendor E-Mailed Questions by 3 pm</td>
<td>March 11, 2016</td>
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<tr>
<td>UCDHS Response to Vendors’ Questions by 4pm</td>
<td>March 17, 2016</td>
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<tr>
<td>Receipt of Vendors’ Response to this RFP by 3pm</td>
<td>March 31, 2016</td>
</tr>
<tr>
<td>On-site demos (if requested)</td>
<td>April - May 2016</td>
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Instructions

Vendor Inquiries
Inquiries regarding this RFP and/or RFP process and the functional or technical requirements of the proposed systems must be emailed by 3 pm PT on Thursday, March 11, 2016. The ONLY UCDHS contact person and address are listed below. Questions must be submitted via email.

Connie Stewart
UCDHS Purchasing Department
E-mail: cjstewart@ucdavis.edu
All questions/inquiries by email
NOTE: DO NOT EMAIL ANY OTHER EMPLOYEE AT UCDHS REGARDING THIS RFP.

Proposal Submittal Instructions
Each Bidder is required to submit their response via e-mail to:

Cjstewart@ucdavis.edu

All responses must be emailed and the email posted and received in the UCDHS Purchasing Department no later than 3:00 p.m. PT on Wednesday, March 31, 2016. UCDHS Purchasing Department will not accept proposals received after the due date and time.

Introduction

University of California at Davis Health System Profile

The University of California, Davis Health System (UCDHS) provides the organizational framework that enables the University of California, Davis to fulfill teaching, research, patient-care and public service missions. It consists of the School of Medicine (SOM), the UC Davis Medical Center (UCDMC), the UC Davis Medical Group and several specific centers such as the UC Davis Cancer Center, the UC Davis Children's Hospital and the UC Davis M.I.N.D. Institute. Together they deliver primary, secondary and tertiary care throughout inland Northern California. The UC Davis Medical Group, the health system's physician network, includes over 500 physicians and 150 areas of medical specialty geographically dispersed in 25 locations.

UCDMC is one of five teaching hospitals operated by The Regents of the University of California. UCDMC is a 619-bed, fully accredited hospital, which serves as the main clinical education site for the UCD School of Medicine. Prior to its acquisition by The Regents in 1973, the hospital was owned and operated by Sacramento County and served as the primary provider of health care to Sacramento's medically indigent population.

UCDMC is the sole Level 1 trauma center serving the Sacramento-Sierra area and the primary tertiary care referral center for a 32-county area of more than five million residents. Each year UCDMC admits approximately 32,000 inpatients, while its 150-plus clinics log more than 828,000 outpatients and emergency visits.

UCDHS Facilities Services Division Profile

UCDHS Facilities Services Division includes several departments that work together closely to implement planning, design and construction of projects for the UC Davis Health System.

Facilities Planning is responsible for meeting the facility needs of each department at the UC Davis Health System which may include everything from space planning, furniture purchases, real estate acquisitions and facility renovation to new construction. They work closely with FD&C as a precursor to projects before they go into the building phase.
Facilities Design and Construction (FD&C) is responsible for implementing the capital improvement program by managing facilities projects from design through construction. FD&C provides project management services to departments within the UC Davis Health System who submit requests to renovate and remodel space as well as design and construct new buildings. The staff that makes up FD&C are directors, administrators, analysts, project managers, inspectors, accountants, architects and engineers.

Capital Finance & Administrative Support is responsible for finance and budget support for capital and non-capital projects as well as the development of design professional consultant agreements and construction contracts. They play a crucial role with FD&C both in the administering of new projects, managing funding approvals and assisting project managers in tracking the financial performance of their projects.

Project Summary

Key Statistics
Meeting the facilities needs for the UC Davis Health System is highly demanding. Projects managed within the Facilities Services department can range from small furniture re-arrangements to major new buildings. Within the Facilities Planning, FD&C, Capital Finance and Administration Support, a staff of over 50 people are actively working on hundreds of projects each year. A “snapshot” of current workload is as follows:

- Over 125 active investigations
- Over 300 "non-capital" expense projects varying in size from $1,500 to $1.5 million
- Over 40 "minor capital projects" varying in size from $35K to $750K
- Over 50 "major capital projects" varying in size from $750K to $85 million

Project Goal
The goal of this project is to find a solution that will allow Facilities Services to manage projects from the initial service request submission through planning, design and construction. A successful system would meet the needs of our clients, individual project managers and department leadership and require minimal customization and special programming to maintain. Fundamentally a successful system would improve projects tracking and delivery.

The implementation of this solution is required to replace our existing project management software system. In the Software Requirements Attachment Primary and Secondary features are clearly identified. Primary features are required to replace the existing system and are a higher priority; Secondary features are further enhancements to improve our operations. Both Primary and Secondary features are to be included in the proposal but where timelines are requested provide specific durations by phase for the Primary features versus the Secondary features to assist us in target dates for the replacement of our existing system.
Solution Requirements

Detailed solution requirements, that the vendor must provide responses for, are outlined in the “Software Requirements” attachment, but the five primary functionality areas are summarized below. All five of these areas have high demands for communication, document sharing and reporting. Systems that emphasize paperless record keeping and require minimal special programming and configuration are preferred.

1. **Client Service and Facilities Service Requests (FSR)**
   Client service is a key component to meeting the space needs of users in the UCDHS. Facility Service Requests (FSR) are how clients make requests to Facilities Services for planning and design services. This software system should automate this procedure using a web based portal and a digital form. Information entered at the inception of the FSR will create the initial project record in the database. The system should establish tracking numbers, allow for routing to multiple reviewers for approval. Based on the information provided the request should be routed to one of several units for assignment to a staff person to do an investigation for a wide range of services including furniture procurement, space planning, space renovation and equipment installs. Data needs to be reportable to both clients and staff so that project status can be tracked and performance monitored.

2. **Investigations, Statement of Probable Cost (SPC) and Project Funding Requests (PFR)**
   Facilities Service Requests are assigned to staff to develop scope and define what is required to facilitate the request. These investigations lead to cost estimates and agreements with the requesting department that are documented in a Statement of Probable Cost (SPC). Once approved Capital Finance generates a Project Funding Request (PFR) that is the final step to gain required approvals and funding for a project. The software system should manage the creating, routing and approval of these key documents required to get to the key milestone of a funded approved project. Data needs to be reportable to both staff and supervisors so that project status can be tracked and performance monitored.

3. **Project Funding, Project Accounting, Project Management and Performance**
   Capital Finance is responsible for tracking project funding approvals and managing Project Accounting. Project Managers need to review and adjust budgets, forecast future costs, maintain a schedule and track project performance. Project Managers are considered recharge and the system needs to incorporate timekeeping for charging time against projects. For small furniture projects notices of department recharges need to be routed to clients for approval before the charges are applied to their accounts. The software system needs to support these efforts so that current expenses are reported and future project costs are lined. The University utilizes a software applications for financial accounting called Kuali. Ideally this project management software system would allow for some kind of transfer of financial information between systems that minimizes the amount of hand entering of data. Data needs to be reportable to both staff and supervisors so that project status can be tracked and performance monitored. One way interface from Kuali to the software system to allow regular transfer of general ledger data.
4. **Consultant and Construction Contracts**
   In the process of delivering projects contracts are executed for both Design Professionals and Contractors. The Contracts Unit maintains the database for hundreds of Consultants and Contractors. Requests for Consultant Contracts, Bid and Award and the execution of the Construction Contracts need to be managed through the software system. Key University forms need to be generated by the software for routing for approvals and signatures consistent with University policy where required. Data gathered on contractor’s and consultants need to be reportable both for single projects and annual reporting for all projects.

5. **Construction Administration**
   Construction contracts from award through contract completion are managed through the project management software system. The system needs to be able to support all the traditional components required for construction administration including submittals, contractor communications, change orders, pay applications, issue tracking and project close out. Web portal access is required for communicating with the design professional and contractor. A post occupancy questionnaire to track client satisfaction should also be included. Data needs to be reportable for single projects and annual reporting for all projects.

**Basis of Award**

Proposals will be evaluated based on cost per quality points. A UCDHS evaluation committee will choose the selected Bidder. Committee participants will review, evaluate, and score each responsive proposal received in accordance with predetermined scoring criteria. The selection process will be broken down into three phases.
THERE WILL BE THREE PHASES TO THIS RFP.

PHASE ONE – Assessment of Corporate Qualifications and Acceptance of University of California Terms and Conditions (possible points = 500):
To be considered responsive and to continue in the scoring process, the Bidder must:

- Provide all fully completed documentation (see "Information Required (attachments)" section of the RFP) as requested by the requested due date and time.
- Compliance with UCDHS’s specified terms and conditions – this includes all terms per [www.ucdmc.ucdavis.edu/supplychain/pdfs/uc-terms-and-conditions-of-purchase.pdf](http://www.ucdmc.ucdavis.edu/supplychain/pdfs/uc-terms-and-conditions-of-purchase.pdf) and Data Security and Privacy Appendix attached. Must acknowledge compliance by signing below and returning this page:

<table>
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<tr>
<th>Signature of acceptance of UC terms and conditions and Data Security Appendix</th>
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Up to 500 points will be awarded during this phase. A score of at least 300 points in this category is required in order to qualify for consideration in Phase Two. If you take exception to UCs terms in whole or in part, it will affect your total score in this category and you may not qualify for consideration in Phase Two. Your acceptance of UC terms by signing and returning this page will qualify for highest point score.

PHASE TWO – Evaluation of ability to meet requirements in 5 different categories (possible points = 1,000). Note: you must have successfully completed Phase One to be rated per below)

Each Bidder will receive a total point score known as total quality points. Quality points will be assigned as follows:

**RFP Quality Points Scoring Matrix**

| 1. Client Service and Facility Space Requests (FSR) & Furniture Request (FR) software requirements | 200 |
| 2. Investigations, Statement of Probable Cost (SPC) & Project Funding Request (PFR) software requirements | 200 |
| 3. Project Funding, Project Accounting, Project Management and Performance software requirements | 300 |
| 4. Consultant and Construction Contracts software requirements | 150 |
| 5. Construction Administration software requirements | 150 |
| **Total Maximum Quality Points** | **1000** |
At the completion of Phase Two scoring, the cost per quality point will be calculated. Responses will then be ranked from lowest cost per quality point to highest cost per quality point. Two or more Bidders with lowest cost per quality points may be invited to participate in PHASE THREE.

**PHASE THREE (Demonstrations and IT Evaluation)**

Demonstrations may be requested of 2 or more Bidders having the lowest cost per quality point scores. Up to 1,000 points may be awarded during the demonstration and Information Technology (IT) Evaluation phase. After the demonstrations are completed, the cost per quality point will be recalculated to include the points awarded in PHASE THREE.

One or more of the Bidder(s) invited to participate in Phase Three will be required to fill out IT questionnaires to facilitate UCDHS IT Evaluation Process. Questionnaires will be provided during Phase THREE. Successful passing of the UCDHS IT Evaluation Process is mandatory prior to contract negotiations.

- The UCDHS IT Evaluation Process is a set of activities and procedures referring to the acquisition of new applications, technology, or technology devices. It is the goal of the UC Davis Health System to ensure new applications, technology, and devices adhere to current Information Technology, Clinical Engineering, and Security standards to safeguard patient privacy, enable organizational efficiencies, and provide overall protection of health systems assets.

Following evaluation of this RFP and Bidder selection, UCDHS expects to negotiate a contract with the selected Bidder and, at UCDHS’s discretion, standard software contractual terms and conditions, cost and/or value added features. UCDHS reserves the right to award this RFP in part or in full.

**Information Requested (attachments)**

Complete the following documents attached with the RFP:

1. Signed acceptance of UC TERMS AND CONDITIONS AND DATA SECURITY appendix (refer to Phase One in the Basis of Award section)

2. CORPORATE QUALIFICATIONS STATEMENT

- The questions asked are intended to help the University to evaluate your corporate qualifications and ability to provide the functionality that our system requires. It is acceptable to attach other information like company brochures but please respond to all questions in this section.
3. SOFTWARE REQUIREMENTS
   Provide your responses in the "Requirements" tab. Scoring points breakdown is included on the "Rqmt Scorecard" tab.

4. COST PROPOSAL & PROFESSIONAL SERVICES for Vendor Hosted Implementation model
   a. Provide solution infrastructure diagram
   b. Attach documentation requested in the Professional Services section

5. COST PROPOSAL & PROFESSIONAL SERVICES for On Premise Hosted Implementation model (if applicable)
   a. Provide solution infrastructure diagram
   b. Attach documentation requested in the Professional Services section

Proposal Conditions

1. Notwithstanding any other provision of the RFP, Bidders are hereby advised that this RFP is a solicitation for proposals only and is not to be construed as an offer to enter into any contract or agreement.

2. UCDHS shall have the unconditional and unqualified right to withdraw, cancel, or amend this request at any time. Bidders shall bear all costs associated with the preparation and furnishing of responses to this RFP. All proposals shall be firm for a period of 180 days following the proposal submission due date.

3. Responses to this RFP should be made according to the instructions contained herein.

4. UCDHS reserves the right to interpret or change any provision of this RFP at any time prior to the submission date. Such interpretation or change shall be in the form of a written addendum to this RFP. Such addendum will become part of this RFP and any resultant contract. Such addendum shall be made available to each company that has received an RFP.

5. UCDHS has, at its sole discretion, the unconditional and unqualified right to determine that a time extension is required for submission of proposals, in which case, a written RFP addendum issued by UCDHS shall indicate the new submission date for proposals.

6. Prior to the final submission date, any Bidder may retrieve its information to make additions or alterations. Such retrieval, however, shall not extend the final submission date.

7. Bidders wishing to submit information in response to this request do so entirely at their own expense, and submission of a proposal indicates acceptance of the conditions contained in the RFP unless clearly and specifically noted otherwise.

8. PUBLIC INFORMATION AND TRADE SECRETS--The California Public Records Act limits UCDHS’s ability to withhold pre-qualification and bid data to trade secrets or records, the disclosure of which is exempt or prohibited pursuant to federal or state law. If a submittal contains any trade secrets that Bidder does not want disclosed to the public or used by UCDHS for any purpose other than evaluation of the Bidder’s eligibility, each sheet of such information must be marked with the designation “Confidential.” UCDHS will notify
the Bidder of any request, by another party, to inspect such confidential information. Bidder will have an opportunity to establish that such information is exempt from inspection in any proceeding to compel inspection.

9. All computer programs and data made available by UCDHS to Bidders hereunder shall remain the property of the UCDHS and shall be maintained, used, and disseminated in accordance with the California Information Practices Act of 1911, Civil code Sections 1798 through 1798.76, and the California Public Records Act, Government Code Section 6250 through 6260. All listings and all copies of listings that reveal names or identification numbers of individuals, (i.e., employees, patients, etc.) shall be destroyed or returned to UCDHS.
Contract Terms and Conditions

1. The University’s Terms and Conditions of Purchase (http://www.ucop.edu/procurement-services/_files/uc-terms-and-conditions-of-purchase.pdf) shall apply to any order resulting from this RFP.

2. No form of the University’s name shall be used in promotional materials, signs, announcements, or other forms of communication or advertising originated by Bidder unless the University’s express written permission for such use has been obtained in advance.

3. Under existing campus policy (P & P Manual #260-15) a gift or donation to the University may not be coupled with the expectation of tangible compensation or with the imposition of contract or grant requirements. Each purchasing transaction, business contract, research contract, affiliation agreement, and grant shall be considered as separate and whole in itself. As such, it is the policy of the University of California Health System that no gift or donation to the University, nor any of its business contracts, purchasing transactions, research contracts, affiliation agreements, or grants shall be used as partial consideration for any other transaction, contract, agreement, grant or gift/donation.