

Request for Proposal
for
Facility Condition Assessment Services
and Capital Planning Software
for
<Client Name>

Release Date:

Date Due:

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1.0 Program Overview

<client> Overview

<the client> is seeking a single source provider for Facility Condition Assessment (FCA) services and Capital Planning and Management Software (CPMS).

For <the client> to ensure a truly independent understanding of the condition of the entire portfolio, as well as to avoid perceived or real conflict of interests, firms that perform the assessments (including subcontractors) will not be eligible for any repair, remediation, and renewal work.

<Client provides specific overview for project>

1.1 Project Objectives

<client> is soliciting proposals for a facilities capital management solution to support the effective management of its facility assets and to provide insights for directing long-term investments in those assets.

The desired solution will encompass two major elements:

- **Services** to include a physical assessment of facilities and building systems to identify deficiencies, required actions, and associated timelines and costs.
- **Software** to maintain this asset information and facilitate the development of long-term capital plans, budgets, and reports.

The desired solution will:

- Employ a consistent assessment methodology based on ASTM E2018 to evaluate needs and associated costs across these facilities
- Be proven through successful FCAs on more than 5 billion gross square feet of a variety of buildings and other assets
- Include a highly experienced team that is solely dedicated to conducting FCAs; assessors should have an average of more than 10 years of assessment experience
- Be based on a nationally recognized cost database, with RSMeans™ being preferred
- Be configurable to <client>'s specific requirements, such as need categories and time priorities
- Use its own—not provided by a third-party—capital planning software to collect data and provide the required analyses and reports
- Provide ongoing access to the same software for use by <client> as part of its capital planning process
- Include tools for analyzing needs within specific buildings, groups of buildings, or the entire portfolio
- Provide dynamic generation of key metrics, including Facility Condition Index (FCI)
- The capital planning software should be part of a broader platform to enable a seamless flow of data to other processes, such as procurement or project management

1.2 Summary of the Requirements

Comprehensive Facility Condition Assessments (FCA)

- The Vendor will provide a qualified and experienced assessment team(s) to complete comprehensive FCAs for selected in-scope facilities noted in Exhibit A.

Capital Planning and Management Software (CPMS)

- The Vendor shall provide a scalable, web-based capital asset planning and management software product that will enable <client> to manage information about facility assets and will provide tools for evaluating capital needs and creating capital projects, plans, and multi-year budgets and populate the information collected through the FCA services into the software.

Value-Added Supplemental Services

- The Vendor must be able to demonstrate experience in providing ongoing capital planning support through the delivery of professional consulting services that can be provided on an “as, if, and when” requested basis or through the provision of an ongoing capital planning program. The Vendor must have dedicated resources to deliver this support and must be able to provide examples. The Vendor should also provide other value-add options which, based on Vendor experience, they would recommend to enhance <client>’s capital planning program.

1.3 Key RFP Dates

Timelines

Activity	Date
RFP Release Date	<insert date>
Deadline for Questions to be submitted by Vendors	<insert date>
Answers to be provided to Vendors	<insert date>
Proposals Due (Late submissions will not be considered)	5:00 pm EDT on <insert date>
Shortlist Presentation	<insert date>
Anticipated Award	<insert date>
Anticipated Contract Start	<insert date>

Note: <client> reserves the right to deviate from this schedule.

1.4 Point of Contact

All contact with <client> in connection with this RFP should be made through the contact indicated below:

Name:	Phone:
Title:	Email:

1.5 Questions

Questions should be submitted via email to the contact listed in section 1.4 no later than <insert date>.

2.0 Scope of Work

2.1 FCA Service Requirements

The Vendor should thoroughly know ASTM Designation: E 2018-01, Standard Guide for Property Condition Assessments: Baseline Property Condition Assessment Process documents.

The Vendor will visually inspect all assets in the project's scope to assess the remaining lifecycle of major asset systems and identify deferred maintenance requirements. Requirements are conditional, operational, and system replacement needs, all relating to the system lifecycle. Each requirement must be individually classified by priority, requirement category (cause of issue), asset system, inspector, and cost, allowing multiple queries and data analyses.

Based on <the client>'s available existing information, the Vendor will collect base data on the assets included in the assessment as listed in Exhibit A. This data should include location, asset number, name, date of construction, number of floors, gross area, uses, types of heating and cooling systems, site maps, principal asset activities, and outstanding asset code violations.

The assessment should include the following systems for type and existing conditions:

- Building exterior systems: roofs, walls, window systems, exterior doors, and structural components
- Building interior systems: walls, doors, floors, and ceilings
- Linear systems
- Heating, ventilation and air conditioning, controls and instrumentation, special equipment
- Electrical service and distribution
- Lighting and branch wiring
- Communications and security
- Plumbing
- Fire protection

- Elevators

Photos shall be taken to identify the major asset systems and later imported and linked to assets in the CPMS application.

Data defining the survey results must be entered into the CPMS application. A separate record must be created for each asset surveyed. Assets shall be defined as buildings and linear elements.

Included as an optional service, the Vendor should describe their equipment inventory, tagging and barcoding services, and the approach to catalog and document inventory equipment information for future upload into <the client>'s preferred CMMS solution.

2.2 Software Requirements

All assessment data must be stored in a Capital Planning and Management System (CPMS) that supports the assessment methodology, objectives, and project requirements described in this document. The Vendor must be able to demonstrate that the software requirements noted below are out-of-the-box and require no additional development.

The Vendor's CPMS must meet the following requirements:

- Provide <the client> with the capability to continually update all data, manage deferred maintenance reduction, and predict future capital renewal
- Be capable of attaching photos to various data elements
- Include a cost estimating system embedded within the overall software, which uses costs based on RSMeans, including local city cost indices and integrated annual cost updates
- Support multiple building types and site assets
- Be able to create multiple/unlimited portfolios
- Display projects at a Uniformat Level 4
- Show visualization of needs by space, timeframe, buildings, systems, and portfolios
- Provide both filter and drill downs on visualizations
- Be able to prioritize requirements and/or projects based on both condition and non-condition data
- Configurable scoring and ranking for projects aligned with <the client> strategies
- Be able to connect capital planning data with estimating and procurement applications
- Support mobile data collection devices/technology
- Must be web-browser-based
- Must support unlimited read/view users and be able to accommodate 300+ concurrent users with read, write, and edit capabilities at the same time
- Include a searchable and browsable online help system
- Be able to generate a Facility Condition Index (FCI) and Net Asset Value (NAV) that follow recognized industry standards
- Be able to export all data

3.0 Technical Proposal Requirements and Framework

The following format, sequence, and instructions should be followed to provide consistency in Vendor responses and ensure each proposal receives full consideration. All pages should be consecutively numbered. The Technical Proposal must be structured as follows:

- Table of contents, including page numbers
- An executive summary of the key features of the proposal
- The body of the proposal, exclusive of pricing (i.e., the “Vendor Response”)
- Pricing must be provided separately from the Technical Proposal in the Fee Proposal

The Vendor’s response must follow the format outlined below. Failure to do so may result in disqualification. To receive full consideration during evaluation, proposals should include a detailed response to the following requirements.

3.1 Company Overview

At a company level, the Vendor should discuss its skills and expertise, knowledge and experience, and professional qualifications in providing the software and services set out in this RFP. In doing so, the Vendor should provide in its Proposal:

- A brief description of the Vendor
- A description of the goods and services the Vendor is currently delivering
- Information on experience the Vendor has that is directly relevant to this project
- It is important for <the client> to partner with a company, team, and solution that can demonstrate financial health, backing, and dedication to develop best-in-class solutions for the long term. Provide a corporate description of your company—including financial results—indicating stability (e.g., recurring revenue, market and leadership success, etc.).

3.2 Experience and Qualifications

Describe the Vendor’s experience on at least five projects that are similar in size, geographic distribution, and magnitude to <the client>’s portfolio, and other qualifications that prove the Vendor’s abilities.

Additionally, the Vendor is requested to provide three references from customers who have obtained similar goods or services from the Vendor within the past five (5) years, and include the following information:

- Company Name
- Company Address
- Contact Name and Title
- Contact Telephone Number

- Date Work Undertaken (start date and actual/projected end date)
- Nature of Assignment

3.3 Facility Assessment Team

The Vendor will determine the overall make-up and number of resources for their facility assessment team or teams. However, <client> requires that the Vendor:

- Designate a single, dedicated Project Manager who has overall responsibility for all Assessments
- Designate dedicated Team Leads for each Facility Assessment Team who has overall responsibility for the FCA(s) provided by the Team and reports to the Project Manager
- Ensure each Facility Assessment Team has an adequate number and type of discipline expertise (i.e., architectural, mechanical, electrical, etc.) appropriate for the facility or site and systems being assessed
- Ensure that all other resources provided by the Vendor are properly trained, qualified (holding all appropriate professional designations), and experienced to conduct Facility Condition Assessments

The Project Manager will act as the Vendor's overall lead. This person will direct and coordinate the project and ensure the completion of all activities related to the FCAs. This role will require an individual with considerable expertise and experience in delivering the requested services. <Client> reserves the right to ask for a replacement of any member of an Assessment Team at its sole discretion; however, this right is not expected to be exercised lightly or without due cause.

All resources on a Facility Assessment Team(s) will be qualified technical personnel. These staff will be capable of effectively interpreting existing facility condition reports, and conducting system assessments in architectural, electrical, and mechanical disciplines.

3.3.1 Organization Chart

Vendors must provide an Organization Chart showing the entire project team by position title and the names of the Key Team Members. The chart must clearly show all positions and the reporting structure.

3.3.2 Resumes

The Vendor is to provide the resumes of the Key Team Members only. Assessment consultant professionals assigned to this project must average at least 10 years of experience in their respective disciplines (Architectural, Electrical, and Mechanical).

The Vendor should discuss the skills and expertise, knowledge and experience, and professional qualifications of each Key Team Member who will be assigned to the project. Responses should focus on experience providing similar or identical services to those described in the RFP.

3.4 Description of Solution

3.4.1 FCA Services

The Vendor should provide a detailed description of how FCA Services will be provided. Describe your facility assessment methodology/scope of work, to include:

- The depth and breadth of your assessment offerings
- Incorporation of existing assessment data as provided by <client>
- Field collection techniques
- Adherence to industry standards such as ASTM E 2018-01, Uniformat II, and BOMA
- Nature and source of any asset cost data used during the process, with <client>'s preference being RSMMeans
- How priorities and categories are defined
- Costing and funding analyses to be conducted
- Preparation of reports and findings

The Vendor should provide a detailed overview of its strategy/approach to the completion of FCAs over the Assessment Cycle, addressing topics such as resourcing, process management, and relationship with <client>.

The Vendor should provide a detailed overview of its strategy/approach to completing the FCA, addressing topics such as the inspection process for each Facility and System noted in section 2.1 and the costing of recommended actions.

Upon completion of the assessment, the Vendor will collaborate closely with <client> to craft a strategic multi-year investment plan to maximize the impact of limited resources. Using buildings, systems, work items, and actions data compiled about <client>'s asset portfolio, the Vendor will construct building portfolios, develop a comprehensive multi-year capital plan, and systematically rank projects to facilitate informed project selection. Cost estimates will be generated using the Vendor's construction cost database—preferably RSMMeans—integrated into the capital planning software. This approach will streamline stakeholder input and leverage advanced statistical methods to refine and simplify the prioritization process, ensuring that investment decisions are data-driven and strategically aligned with <client>'s long-term objectives.

3.4.2 Software

The Vendor should provide a detailed description of CPMS software, describing all the features and how it addresses the requirements described in section 2.2.

3.4.3 Hosting

The software should be a Vendor-hosted application. Please describe your hosting capabilities, including the following:

- Your business continuity information security plans for the hosted environment.

- System client-side hardware and software configuration requirements.
- The practices in place for monitoring for unauthorized access to client information.
- The practices in place to work with the client if a breach of client data occurs.

3.4.4 Support

The Vendor must provide an appropriate support program. Please address the following elements of your support program:

- The levels of support available, definitions of each level, and the hours of operation and response times
- Where your support services are located
- Whether support includes product updates, as well as bug fixes at no extra charge
- The helpdesk escalation procedure

3.4.5 Management Plan, Quality Assurance (QA) Plan, and Sample Project Schedule

3.4.5.1 Management Plan

Describe your firm's project management approach to delivering the FCA services in accordance with the scope of services elements.

3.4.5.2 Quality Assurance/Quality Control (QC) Plan

Describe your firm's QA/QC approach to delivering the FCA services in accordance with the scope of service elements.

3.4.5.3 Sample Project Schedule

Provide an example of a typical facility condition assessment project schedule showing the following relevant information:

- Mobilization of the project
- Field data collection and historical asset information
- Preliminary report as described in the deliverables section
- Final report documents
- Final presentation

3.5 Sample Deliverables

Submit a PDF of a sample condition assessment report representative of the report to be produced as part of this scope of services.

3.6 Value-Add Offerings

Given <the client>'s program objectives and the Vendor's best practices experience, the Vendor should detail additional offerings that will ensure the overall short and long-term success of <the client>'s capital planning program. The Vendor must be able to demonstrate dedicated and experienced internal resources to support <the client> in this regard and provide relevant examples of projects whereby the team has successfully delivered such programs.

3.7 Required Attachments

Please provide the following documents:

- <Client-required forms>
- Sample Master Services Agreement (MSA)
- Sample Certificate of Insurance (COI)

4.0 Fee Proposal Requirements and Framework

The Fee Proposal and any mention of pricing must be contained in a separate electronic file. Failure to comply is grounds for automatic disqualification of the proposal. The Fee Proposal forms an integral part of the evaluation. However, only those Vendors who are short-listed will have their Fee Proposal opened. We are not bound to accept the lowest-priced proposal if that proposal is not the most advantageous to our organization as determined solely by <the client>.

4.1 FCA Services

The Vendor should provide a fixed price for completing all FCAs for In-Scope Facilities.

The fixed price quoted for completing all FCAs should include the cost of travel and accommodation incurred by the Vendor in delivering FCA Services.

4.2 Software

The Vendor should provide annual software subscription pricing based on 3-year and 5-year term options.

5.0 Submission Requirements

To ensure a fair comparison of the responses received, please address all items in Section 3 Technical Proposal Requirements and Framework and Section 4 Fee Proposal Requirements and Framework.

Submissions are due electronically by email to <email address> at or before <date and time>. Please note:

- The Technical Proposal—all content except the Fee Proposal—must be emailed with a Subject Line of "<project name> - <vendor name> - Technical Proposal".

- The Fee Proposal must be emailed with a Subject Line of “<project name> - <vendor name> - Fee Proposal”.

Telephone, mail, or facsimile proposals will not be considered. Proposals received after the date of closing will not be considered. All questions relative to this RFP must be submitted in writing or electronically to the individual listed in section 1.4 Point of Contact before the Deadline for Questions specified in section 1.3 Key RFP Dates this RFP document.

6.0 Evaluation Criteria

<Client> will use the following criteria in evaluating proposals received in response to this RFP. The evaluation of proposals and the selection of the successful proposal will be based on the information provided by the Vendor in its proposal, including, without limitation, responses to the Vendor’s qualifications. Consideration may also be given to any additional information helpful to <the client>. We are not bound to accept the lowest-priced proposal if that proposal is not the most advantageous to our organization as determined solely by <the client>.

Completeness of Proposal

Any proposal that does not contain each element described in this RFP, fully completed, initialed, or executed—as appropriate—may be judged to be incomplete and may not be considered further.

Evaluation Criteria	Contribution
Firm experience and staff	20%
Approach and management plan for facility condition assessment	20%
Proposed software and systems	20%
Value Add Offerings	10%
Proposal completeness	10%
Subtotal Score	80%
Proposed fee (only if shortlisted)	20%
Total Score	100%

7.0 Software Demonstration and Oral Presentation

If a presentation is requested by <the client>, the Vendors will be judged for their presentation based upon clarity of presentation and software capabilities, ability to answer both technical and application questions, and demonstrated understanding of the project.

Exhibit A: In-Scope Building List

<Enclose a list of buildings to be assessed, including name, size, location, and primary building use.>