1. Executive Summary

The University of Hawai‘i (UH) System, a 10 campus system situated on six of the Hawaiian Islands is seeking responses to this Request for Information (RFI) to assist in the development of a comprehensive automated Facilities Management System (FMS) encompassing the areas of asset, space, and work order management systems that provides the information database and tools necessary to manage its facilities, infrastructure, buildings and grounds, and lands in the most cost effective way.

2. Introduction

The University of Hawai‘i System includes 10 campuses and dozens of educational, training and research centers across the Hawaiian Islands. As the public system of higher education in Hawai‘i, UH offers opportunities as unique and diverse as our Island home. The 10 UH campuses and educational centers on six Hawaiian Islands provide unique opportunities for both learning and recreation.

The University of Hawai‘i currently has an inventory of over eight million gross square feet of building space, not including off campus research extension sites and self supporting programs. Below is a summary of building space by campus:

<table>
<thead>
<tr>
<th>Campus</th>
<th>Gross Square Feet</th>
</tr>
</thead>
<tbody>
<tr>
<td>University of Hawai‘i at Mānoa</td>
<td>4,919,102</td>
</tr>
<tr>
<td>University of Hawai‘i at Hilo*</td>
<td>1,001,532</td>
</tr>
<tr>
<td>University of Hawai‘i–West O‘ahu</td>
<td>42,127</td>
</tr>
<tr>
<td>Honolulu Community College</td>
<td>802,925</td>
</tr>
<tr>
<td>Kapi‘olani Community College</td>
<td>406,209</td>
</tr>
<tr>
<td>Kaua‘i Community College</td>
<td>256,839</td>
</tr>
<tr>
<td>Leeward Community College</td>
<td>415,253</td>
</tr>
<tr>
<td>Maui Community College</td>
<td>418,395</td>
</tr>
<tr>
<td>Windward Community College</td>
<td>313,786</td>
</tr>
<tr>
<td>Total</td>
<td>8,576,168</td>
</tr>
</tbody>
</table>

*Includes Hawai‘i Community College

The University of Hawai‘i updates its backlog of maintenance annually, which is coordinated by the University’s System Office of Capital Improvements. Data updates are prepared by the University’s three facilities offices: University of Hawai‘i at Mānoa Facilities Planning and Management Office; University of Hawai‘i at Hilo Facilities
Planning and Construction Office; and the Community College Physical Facilities, Planning and Construction Office.

3. Capabilities/Requirements

The University of Hawai'i (UH) requires a new FMS. It should include all standard components of a modern integrated FMS, including:

Asset Management

- Facility replacement value
- Backlog of deferred maintenance
- Identification of deferred maintenance by campus, building, systems, and grouping of types of repairs required
- Calculate Facilities Condition Index and Deferred Maintenance Ratio
  - Facilities Condition Index (FCI) is defined as the deferred maintenance amount divided by the current replacement value
  - Deferred Maintenance Ratio (DMR) is defined as the deferred maintenance amount divided by the current fund expenditures
  - The FCI and DMR should be calculated for the total University System, each unit (University of Hawai'i at Mānoa, University of Hawai'i at Hilo, University of Hawai'i–West O'ahu, Community Colleges), campus, building, and major building components
- Maintenance History
  - Major building systems including, but not limited to, roofs, air conditioning equipment, plumbing, electrical, and information technology
  - Major infrastructure including, but not limited to, roadways, sidewalks, parking lots/structures, lighting fixtures, emergency call boxes, water/sewer/drain lines, electrical substations, electrical distribution lines, transformers and switchgear
  - Grounds maintenance, including, but not limited to, irrigation systems, tree trimming/pruning, and landscape maintenance plan

Space Management

- Physical Space Inventory
  - Identification of room type by assignable and non-assignable spaces (square feet)
  - Classification of space by use and type, categorized by Post-Secondary Educational Facilities Classification Manual
  - Provision of indirect cost rate accounting and reporting of space in terms of use percentage for academic space and other spaces according to OMB Circular A-21 guidelines
- Space Occupant Inventory
  - Identification of room occupants, including principal investigator for laboratories, and a means to update the information
Determine space occupancy ratio, to include rate between occupied rooms and available rooms
- Classroom occupancy ratio, to include the average percent of student stations in the room being occupied during assigned classes
- Space Reporting System
  - Reporting system to examine space utilization, occupancy ratio, and summary of overall use of space
- Interactive Building Floor Plans
  - Database including as-built floor plans
  - Ability to update building space plans in CAD or other format

Work Order System

- Processing of Work Order Requests
  - Initiation of work order request by campus clients in a web based format
  - Work order verification by appropriate administrators (i.e., building coordinator, fiscal officer, etc.)
  - Identify account(s) and approval(s) for work to be charged back to campus departments
  - Automatic reply to receipt of work order request and contact information
- Administration of Work Order Requests
  - Establish clearinghouse for receipt for work orders
  - Clearinghouse to distribute work order requests to appropriate trades shop or engineering/architectural division
  - Ability to prioritize and schedule work orders
  - Track time/materials for each work order with interface with personnel salary database for costing, with capability of updating information on both data sets
- Status Reports
  - Web based reporting system for the status of work orders
  - Generation of reports by shops, buildings, and other variables

4. Desired Outcomes of FMS

The goals for the UH FMS include the following:

Asset Management

- Consistent collection of deferred maintenance data
  - Type of projects and estimates must be done consistently; however, estimates must include cost factors specific to each campus (i.e., construction cost on different islands/locations)
  - Accurate collection of data and estimates
- Ability to replicate/update information consistently
  - Training of University personnel for the collection and update of deferred maintenance data
- Life cycle projection of buildings and building systems
Space Management
• Collection of space management data
  - User friendly web based collection and update abilities for space management
  - Various levels of user access
• Enable reporting of space utilization for calculation of space usage
  - Calculation of classroom, laboratory, office, and research space required
• Provide a timely and up to date means to capture room usage and occupancy

Work Order System
• User friendly web access for University personnel to submit requests
• Allow for tracking of the status of work requests
• Provide various reports to administrators
  - Request/building ratio
  - Work order financing details
  - Preventive maintenance
  - Forecasts of parts availability
  - Work order aging

5. Implementation

Implementation of the UH FMS includes the following items:

Asset Management

• Generation of Renewal Curve

Utilizing the University’s basic building data (i.e, campus, building name, gross square feet, year built, number of floors), generate a renewal curve for each campus as well as the entire University of Hawai’i. Costs must be based on State of Hawai’i labor, construction, and equipment costs.

• Collection of Schedules of Values

Collection of schedules of values via bid cost documents of recent new construction projects at UH.

• Training of Facilities Personnel

Train facilities personnel at each campus to complete building analysis profile worksheets.

• Technology
Specify and/or provide the necessary hardware for the system, third-party software for the system (i.e., operating systems, database management systems, query/report software, compilers, etc.). Complete installation and configuration of software necessary for operation of the system.

**Space Management**

- Use available existing space data and supplement with further data collection.
- Train personnel at each campus to use the system.
- Integrate software with existing University database systems.
- Specify and/or provide the necessary hardware for the system, third-party software for the system (i.e., operating systems, database management systems, query/report software, compilers, etc.). Complete installation and configuration of software necessary for operation of the system.

**Work Order System**

- Transfer of existing data into the new system.
- Train personnel at each campus to use the system, including clerical, professional and trade shop personnel.
- Integrate software with existing University database systems.
- Specify and/or provide the necessary hardware for the system, third-party software for the system (i.e., operating systems, database management systems, query/report software, compilers, etc.). Complete installation and configuration of software necessary for operation of the system.

**6. Instructions for Response to this RFI**

The University requests that the respondents to this RFI prepare and submit a written response to this solicitation no later than September 21, 2007. Please submit two hard copies and one electronic copy (email or CD) of your response to:

Office of Capital Improvements  
University of Hawai‘i  
Biomedical Sciences Building B-102  
1960 East West Road  
Honolulu, Hawai‘i 96822

All responses must address the following:
1) A complete description of the product(s) and implementation approach you would offer to satisfy some or all of the University’s capabilities/requirements.

2) A description of the approach you would offer to helping the University achieve its objectives of implementing an FMS as described above. This should include complete discussion of any design and development activities already underway, the extent to which you would engage the University in design and/or development activities, and specific timelines for development.

3) Background information and a brief history of your company including current financial statements.

4) Current client references, similar in size and/or complexity to the University of Hawai‘i, who are using any software and/or services offered.

5) Preliminary cost projections including narrative information regarding how they were derived so that the University can assess their reasonableness and likely accuracy. Additionally, provide a breakdown of non-recurring and recurring costs.

6) Expectations of what the University of Hawai‘i will provide in order to make the implementation of the project successful (i.e., staffing, hardware, space on campuses, etc.). Additionally, provide an estimate of the labor required by the University to continue to operate the system, both technical and functional.

Please describe how your proposed solution interfaces with each other, as well as other financial management software.

The goal of this Facilities Management System is to be fully automated, web based, and user friendly. Please describe the capabilities of the proposed system and the training and technical support that would be part of the system.

In addition to those components listed in Section 3 – Capabilities/Requirements, please list any ADDITIONAL or SPECIAL SERVICES that you would be able to provide in developing the comprehensive Asset Management System.

Submittals are confidential to the extent permissible under applicable law. University personnel who will be assessing responses will be eligible to enter into Non-Disclosure Agreements as necessary. The University of Hawai‘i System is a state supported, public university and all procurement is governed by the Hawai‘i Revised Statutes and University of Hawai‘i Board of Regents Policies. Submittals will be considered public documents unless noted as confidential or proprietary by the vendor.
All proposals and material submitted in response to this RFI shall become the property of the University of Hawai‘i and shall be subject to public inspection to the extent required by applicable law. Individuals and firms submitting such proposals may designate specific information in their submissions relating to trade secrets and/or proprietary data as confidential. In the event of a request for the public inspection of information so designated, the request shall be subject to written determination by the Office of the University General Counsel for confidentiality in accordance with Chapter 92F, Hawai‘i Revised Statutes, and subject to further appeal as provided therein.

Any questions regarding this RFI should be directed in writing to Ryan Kurashige at rtk@hawaii.edu. Questions and answers and any updates to this RFI will be posted at http://www.hawaii.edu/oci/projects.html. The University of Hawai‘i reserves the right to incorporate in a later solicitation, if issued, any recommendations presented in a response to the RFI.

It is the responsibility of interested vendors to check the aforementioned web site for updates to this RFI.

No oral or written statements made by any University personnel shall be considered addenda to this RFI unless the statement is confirmed in writing or posted at the aforementioned web site and identified as a written addendum to this RFI.

The University shall not be responsible for any costs associated with developing and submitting a response to this RFI.

Based on its assessment of the information received in response to this RFI, the University may request additional information from one or more respondents, may request presentations regarding capabilities and development activities underway, may request visits to reference sites, or any combination of these or other activities that may help the University understand its opportunities. Additionally, the University may issue a formal RFP based on responses to this RFI.