

 UNIVERSITY OF NORTH CAROLINA CHARLOTTE	REQUEST FOR PROPOSALS #66-25066 SB University of North Carolina at Charlotte Purchasing Office Reese Building, 3 rd Floor 9201 University City Boulevard Charlotte, North Carolina 28223-0001
Addendum Issue Date: May 7, 2025	Due Date: Thursday, May 15, 2025 @ 2:00 PM ET
Purchasing Contact: Scott Brechtel	Process and Asset Management System Consultant
ADDENDUM #1	

This addendum is issued to answer questions posed regarding the solicitation.

1. Section 5.1 General Background: What is the name of the consultant the Facilities Management (FM) department worked with in 2019-2020 to provide efficiency and effectiveness recommendations? Has the FM department worked with any other asset management consultants since 2020?
A: **Hickling and Associates. No other consultant since 2020.**
2. Section 2.4 RFP Schedule: We are requesting an extension to the proposal deadline of Thursday, May 15, 2025. Providing a complete, well-rounded proposal that meets the FM department's needs will take additional time.
A: **Due to other internal timelines, the submission deadline cannot be extended.**
3. Our team would like to know if it would be feasible to change the May 15th due date listed in Section 2.4 RFP SCHEDULE extending it to around May 30th.
A: **Due to other internal timelines, the submission deadline cannot be extended.**
4. Do you have any Asset Management Policies, such as an Asset Management Policy, a Strategic Asset Management Plan, and a Data Management Policy?
A: **The University has an Asset Management Policy, a Strategic Asset Management Plan, and draft Asset Management Plans.**
5. Besides Archibus, are there other programs used to manage or track asset information?
A: **Archibus is the only official system, but there are unofficial shadow system spreadsheets in use.**
6. Will the number of assets or asset types be provided?
A: **Greater than 44,000 assets including all major systems and components for HVAC, electrical, plumbing, fire alarms, fire sprinklers, access control, building envelopes, elevators, and some linear assets.**

7. I see an attachment A in the RFP, but no downloadable attachment. Would you happen to know if this will be provided?

A: There is no Attachment A provided by the university to download. Vendors are to develop the financial proposal on their own and label it as "Attachment A" when submitting their proposal.

8. Under implement the asset management system, **section 5.3, 1, D**. Asking for clarity, as the implementation scope is typically based on the assessment results. Are you looking for costs associated only with the assessment, framework development, standards, policies, procedures, and staff training? Or are you looking for turnkey, where the vendor develops or optimizes the hierarchy, data attributes, criticality, FMEAs, maintenance strategies, tasks, and job plans based on the framework and policies developed?

A: Primarily costs associated only with the assessment, framework development, standards, policies, procedures, and staff training. The other items listed above might become elements of 5.3.2. if consultant's assessment warrants.

9. 2.8 Proposal Contents asks for "an asset management system procedure manual." Since that manual is our intellectual property we assume you are asking for a sample of that and not the entire manual?

A: A sample manual is expected with the proposal. The awarded Vendor would be expected to complete the development of a manual of administrative procedures for completing routine asset management tasks to guide offices and departments in asset management workflows. That manual would be developed for the university and be entirely the property of the University.

10. 5.3 Tasks and Deliverables says:

"c. Develop necessary documentation and procedures

d. Implement the asset management system

e. Provide training and support to university staff"

The duration and level of effort for those items will vary depending on the current state of maturity of the Asset Management System discovered during assessment. Would UNC like to provide an estimate of their maturity level so the bidders can provide a comparable cost and approach?

A: The University's self assessment suggests that we have reached IAM maturity level 1 - awareness and are at the beginning of IAM maturity level 2 - developing.

11. **Asset Portfolio Scope (Section 5.3):**

What is the total count and types of assets across the campus that will be included in the ISO 55000 implementation (e.g., buildings, IT assets, utilities, fleet)?

A: Greater than 44,000 assets including all major systems and components for HVAC, electrical, plumbing, fire alarms, fire sprinklers, access control, building envelopes, elevators, and some linear assets.

12. ISO 55000 Compliance Details (Section 5.3):

- Has the university already started implementing any ISO 55000 components, or is this a ground-up build?
- Is ISO certification required by an external certifying body, or is the focus solely on internal compliance?

A: The University has an Asset Management Policy, a Strategic Asset Management Plan, and draft Asset Management Plans plus a lifecycle management plan. Compliance rather than certification is the requirement.

13. System Integration (Section 5.3):

- What existing systems (besides Archibus) will the new AMS and EAMIS need to integrate with (e.g., HR, finance, maintenance systems)?

A: HR, finance, procurement, BAS, GIS, BIM and others that will be determined upon evaluation.

14. Customization vs. Off-the-Shelf (Section 5.3):

- Is the university seeking a fully custom-built AMS/EAMIS or looking to adapt an off-the-shelf solution with configurations?

A: Off-the-shelf solution with configurations

15. Data Standards Compliance (Section 5.3):

- Can you clarify the priority/mandatory nature of compliance with standards such as ISO 14224, COBie, SAE JA1011/1012, ISO 19650?

A: The standards cited govern data structures, definitions and metadata that are expected to be the guideline for how data will be generated, manipulated and stored.

16. Assessment Scope (Section 5.3):

- Is there existing documentation on current asset management practices we can review ahead of the assessment?

A: Upon award all documentation will be shared with the awarded Vendor.

17. Staff Training (Section 5.3):

- How many staff members (and in what departments) are expected to be trained, and what is the preferred training format (in-person, hybrid, online)?

A: Several hundred staff members in multiple departments will require training in all three formats. The requirements assessment is expected to define the details.

18. Documentation (Section 2.8 (d)):

- What level of detail is expected in the asset management plan and procedure manuals? Are there any university templates or formats that must be followed?

A: Level of detail will be assessed and there are no mandatory templates.

19. Scalability Requirements (Section 5.3):

- What specific scalability goals should be planned for (e.g., percentage of asset growth, new facilities being built)?

A: Scalable for new facilities to be built and increased number of asset types as determined by the assessment.

20. On-Site vs. Virtual (Section 5.5):

- What is the university's preferred balance between on-site work and remote/virtual project tasks.

A: Much of this process is a change management process which requires sustained contact and the earned trust of the people involved in that change. This will require on-site interaction to develop that relationship and to gain an understanding of how assets are currently managed and what they are used for. Remote/virtual is allowed for efficiency but not to the exclusion of effectiveness.

21. Software & Implementation Vendor Criteria (Section 5.3):

- Are there any preferred vendors or platforms, or is this a fully open evaluation?

A: This is a fully open evaluation for robust asset management and reliability management platforms. General purpose CMMS' and IWMS' with little to no functionality for the predevelopment, routine capture and analysis of failure modes, root cause, linear assets and asset lifecycle plans will not be considered. ISO 55000 and SAE JA1011/1012 are the guiding documents for EAMIS data management capabilities for asset and reliability data.

22. Sandbox Environment (Section 5.3):

- Can you clarify the expected scale and use cases of the "live sandbox" for faculty research and curriculum? Are there security/compliance requirements tied to this?

A: The exact scale and use will be determined in the requirements assessment but the concept is to allow full access to reliability and asset management functions as well as full raw data access for ~100-200 students and faculty each semester to solve simulated problems in facilities management.

23. AI Readiness (Section 5.3):

- What is the university's current or near-future AI strategy for asset lifecycle and reliability analysis? Are there any specific tools or methods expected?

A: The assessment will propose AI use strategies based on industry offerings and development trajectories to accomplish analysis for optimization and automation of routine and complex workflows.

24. Timeline Tightness (Section 5.4):

- Is January 2026 a hard deadline for the EAMIS RFP development? What flexibility is there if additional time is needed?

A: Jan 2026 is a hard deadline. Collaborative prioritization of minimum requirements vs full requirements will occur between the University and the consultant in the initial planning immediately following award of the contract.

25. University Team Support (Section 5.5):

- Can you clarify which university roles or departments will act as key liaisons, and what level of commitment (FTE %) is expected from their side?

A: **To be determined during initial assessment after the award of the contract.**

26. Information Systems Access (Section 2.8 (d)):

- What access protocols are in place, and are there specific security clearances or background checks required for our team?

A: **Access to the University and its systems will be coordinated upon award. Basic background checks and NDAs for data access will be included.**

27. Space & Resources (Section 4.8):

- Will on-site consultants have access to dedicated workspace, campus facilities, or IT infrastructure?

A: **TBD based on submitted proposals.**

28. Budget Expectations (Section 4.1):

- Is there a target budget range for both Task 1 and Task 2 that vendors should be aware of when preparing the financial proposal?

A: **There is no target range.**

29. Payment Milestones (Section 4.2):

- Are there preferred invoicing and milestone payment schedules for each deliverable?

A: **Based on submitted proposals.**

30. Risk Management (Section 5.3):

- Are there specific risks (e.g., campus disruptions, IT security) the university is particularly concerned about, and should we address mitigation strategies in our proposal?

A: **Specific risks have not been identified for consideration in the proposal, however, the assessment process should elicit identification.**

31. Sample Deliverables (Section 2.8(d)):

- What level of confidentiality is required for sharing sample deliverables from other clients? Would anonymized samples be acceptable?

A: **Anonymized samples are acceptable but may be identified as references.**

32. Case Study Depth (Section 4.5):

- Is there a preference for university case studies over private-sector ones, or are both equally acceptable?

A: **Preference will be given to case studies that most closely represent the conditions that may be found at UNC Charlotte as listed in this RFP. University case studies may include activities that are not representative of the activities required by this RFP and would be discounted against industry case studies that more closely resemble our needs or vice versa.**

33. Cybersecurity Requirements (Section 5.3 & 6.6):

- Will the AMS/EAMIS need to comply with specific university or state cybersecurity frameworks (e.g., NIST, state privacy laws)?

A: **In general, yes. The details will be determined during the assessment.**

34. HSE Scope Definition (Section 5.3):

- Can you clarify the full scope of the HSE department's involvement in this project? Does it include environmental compliance, workplace safety, and health monitoring systems, or only certain parts?

A: **The assessment will determine through interviews with the HSE department their fullest reasonable scope of involvement.**

35. Data & System Integration (Section 5.3):

- What current HSE systems are in use (e.g., incident reporting, compliance tracking), and will they need to be integrated into the new EAMIS or asset management system?

A: **Current HSE functions are scattered across systems including homegrown reporting, an HSE independent platform, Archibus and emails/spreadsheets.**

36. HSE Compliance Standards (Section 5.3):

- Are there specific OSHA, EPA, or state regulations that must be embedded into the asset management processes or system functionalities?

A: **Yes. This will be determined by the assessment.**

37. Cross-Departmental Links (Section 5.3):

- How closely does HSE currently work with Facilities Management and IT? Should the system support real-time alerts or reporting across departments?

A: **Very closely in several areas. This will be determined by the assessment.**

38. Asset Classes for HSE (Section 5.3):

- Which types of assets are considered critical from an HSE perspective (e.g., lab equipment, HVAC, hazardous materials storage)?

A: **Examples listed are correct. Details will be determined by the assessment.**

39. HSE Reporting & KPIs (Section 5.3):

- What are the key performance indicators (KPIs) or reporting outputs that the university expects from the system for HSE purposes?

A: **This will be determined by the assessment.**

40. HSE Training Requirements (Section 5.3):

- Does HSE have unique training requirements (e.g., for hazardous materials handling) that should be part of the staff training deliverable?

A: **This will be determined by the assessment.**

41. If there are any contract exceptions, should we submit those as part of RFP response, or will it be part of negotiation after awarding the contract?
A: If there are exceptions to the terms and conditions, those should be submitted as part of the proposal because they may factor into the award determination.
42. Scope of Work - Page 13 - It states, "implement the system across all relevant departments and facilities, train staff on the use and maintenance of the system,". However, it appears that the scope is to only provide recommended EAMIS solutions (Other than ISO 55000 AM system) and their potential vendors. Does this RFP need to include any estimate/cost for implementing system. Please clarify scope.
A: The statement cited from page 13 refers to Task 1 which requires the implementation of an ISO 55000 compliant asset management system of processes and procedures and does not refer to Task 2 which requires the assessment of requirements for an enterprise asset management information system (software).
43. How many users are currently using Archibus IWMS solution?
A: That is a hard question to answer because of numerous categories of user access, each of which has a different cost implication for each system vendor. The details will be provided to the awarded Vendor.
44. Provide approximate asset breakdown, asset type and count which are currently tracked for asset lifecycle and maintenance.
A: Answer provided in previous questions.
45. What additional support is required in addition to gathering requirement for EAMIS selection, comparative analysis, Evaluation metrics. Does city need assistance in developing the RFP, Pricing, Vendor demonstration etc?
A: Rough order of magnitude pricing for the three recommended solutions is expected.
46. What is University's preference on starting these 2-work stream (ISO55000 and EAM assessment and Rfp support) in parallel ,overlapping or sequential?
A: Both workstreams should start upon award and continue simultaneously, although the EAM assessment must be completed by Jan 2026.
47. Re: Strategy consultant reference in RFP Section 5.1
Which consultant was used to complete the Asset Management Strategy and assessment? If the name cannot be shared, is this consultant prohibited from submitting a response for this proposal? Will you provide a copy of the consultant's report?
A: The asset management strategy was completed by University personnel without the assistance of a consultant.
48. Re: budget (RFP reference Section 7.0, attachment A)
What is the proposed budget for this contract? What is the expected budget for the purchase and implementation of a new EAMIS?
A: There is no established target budget.

49. Re: UNC Organizational structure (RFP reference Section 2.8, subpart (d), bullet requesting identification of university staff for involvement)
Is there an executive sponsor for this project? If so, what is the role (i.e., CFO) and department?

A: **The Associate Vice Chancellor for Facilities Management is the sponsor.**

A SIGNED COPY OF THIS ADDENDUM MUST BE INCLUDED WITH YOUR PROPOSAL

COMPANY NAME	DATE
PRINTED NAME	SIGNATURE