Maine's Public Universities
UNIVERSITY OF MAINE SYSTEM

REQUEST FOR PROPOSALS #2026-010
Integrated Work Management System
RESPONSE ADDENDUM #1
February 20, 2026

CLARIFICATION

None

QUESTIONS

RFP Process or Content Questions

1. Did UMS view any product demonstrations prior to releasing this RFP?
   ANSWER: Pursuant to 1 M.R.S.A. 402(3)(E), the RFP materials are records and working papers used by or prepared for an administrative committee of the University of Maine System and are not public records and not available for review at this stage of the process.

2. Is there a budget earmarked for this effort?
   ANSWER: There is budget earmarked for this solution. It is not in the best interest that the University share budget information.

3. Is there an approved budget for this project? If so, what amount is allocated for software licensing and what amount for implementation services?
   ANSWER: Refer to answer to question 2 in this section

4. Is there a budget for this IWMS project? Can UMS share the budget?
   ANSWER: Refer to answer to question 2 in this section

5. Does the University have a defined budget for this project? If there is not a defined budget, please provide a budget range?
   ANSWER: Refer to answer to question 2 in this section.

6. Do you already have a solution in place that you are looking to replace? If so, what are the pain points with the existing solution?
   ANSWER: Refer to Overview in the section below titled Solution Requirements Questions:

7. What specific problems or inefficiencies are you hoping to address
   ANSWER: Refer to answer to question 5 in this section

8. Is there an incumbent in place providing similar services or solution that "Customer" is looking to replace?
   ANSWER: Yes

9. Tables 2 and 3 of the Cost Template reference labor hours. We are providing an out-of-the-box solution. Our support and maintenance are a fixed fee, not hourly. UMS has access to our entire team as needed. The fixed-price fee gives a predictable scenario, making forecasting and budgeting

simpler for our clients. Any additional development work that may be required in the future would be a fixed fee based once the requirements are established. Is that acceptable to UMS?

ANSWER: As noted in the general instructions for Appendix C, if a particular cost table is not required as part of your response simply leave it blank.

10. Table 4 of the Cost Template asks for module pricing. Our platform is an integrated out-of-the-box solution. Our software is configured per the requirements specified in the RFP; the cost is based on dollars per user per month, not individual modules. Is that acceptable to UMS?

    ANSWER: As noted in the general instructions for Appendix C, if a particular cost table is not required as part of your response simply leave it blank.

11. Is UMS open to negotiating contract terms at a later stage of the RFP process? Or does UMS want participants to provide redlines as part of the RFP submission?
    ANSWER: Each Respondent as part of their response is required to review RFP Appendices D and D1.

12. Is termination for convenience a mandatory clause for UMS? Pricing is typically provided for multi-year agreements without termination for convenience. If termination for convenience is required, is UMS open to 1-year contract with the ability to renew?
    ANSWER: Each Respondent as part of their response is required to review RFP Appendices D and D1.

13. What is the expected contract term for the selected solution? Should vendors provide 1, 3, and 5 year pricing?
    ANSWER: UMS anticipates establishing a five-year contract with the selected Respondent to support implementation, ongoing licensing, hosting, maintenance, and long-term application support for the IWMS. While the final contract term will be determined during negotiations with the awarded vendor, Respondent's provide five-year pricing to support a comprehensive evaluation of total cost of ownership. -year contract with the selected Respondent to support implementation, ongoing licensing, hosting, maintenance, and long-term application support for the IWMS. While the final contract term will be determined during negotiations with the awarded vendor,

    Pricing should clearly identify all recurring and nonrecurring costs, including licensing, hosting, maintenance, support, implementation services, and any optional modules. As outlined in the RFP, the proposed solution must be fully built and deployable at contract award, and pricing should reflect a complete, production ready system without reliance on future development or beta functionality.-recurring costs, including licensing, hosting, maintenance, support, implementation services, and any optional modules. As outlined in the RFP, the proposed solution must be fully built and deployable at contract award, and pricing should reflect a complete, production-ready system without reliance on future development or beta functionality.

14. Can you provide a brief overview of the structure of the FM teams for the different UMS campuses?
    ANSWER: Please refer to RFP Section 1.1.2 for the University of Maine System background including campus specific information.

15. Can work be performed and supported from locations outside the United States as well in addition to onshore teams.

ANSWER: No

16. Are there any restrictions for the development work to be performed offsite?
    ANSWER: Work must be performed in the United States. Keep in mind that UMS is pursuing a replacement solution that is already built, fully deployable, and capable of meeting the complete functional scope at the time of implementation. Solutions requiring new development, beta features, or functionality dependent on future product releases would not meet the requirements of this RFP and will be deemed non-responsive.

17. Can we do estimation only for the required Features for the 1st Phase of implementation
    ANSWER: UMS expects Respondents to provide a complete and fully costed proposal for all Required features identified in the Solution Requirements. While implementation may be phased for scheduling and resource management purposes, UMS does not intend to limit cost estimation to only a subset of Required features. All Required functionalities must be fully built, available, and deployable at contract award, and pricing must reflect the total cost to deliver the complete, production ready solution.-management purposes, UMS does not intend to limit cost estimation to only a subset of Required features. All Required -ready solution.

    If a Respondent proposes a phased implementation approach, UMS will review that plan; however, cost estimates must still encompass all Required features—not only those included in the first phase—to ensure a comprehensive evaluation of total cost of ownership and to avoid future unbudgeted expenses.

Solution Requirements Questions:

For the questions bulleted directly below please refer to the following RFP documents:

1. Filename: 03 - 2026-010-RFP-IT-RFP and specifically section 1.1.3 (purpose statement)
2. Filename: 03 - 2026-010-RFP-IT-RFP-SubmissionFormPackage, Appendices H, I and J
3. Filename: 05 - 2026-010-RFP-IT-SolutionRequirements – This document provides the University's requirements for the solution.

Overview: The University of Maine System (UMS) currently utilizes an IWMS platform; however, the existing solution does not provide several of the core capabilities required under this RFP. As detailed in *05 – 2026010RFPITSolutionRequirements*, the System seeks a comprehensive, enterprise class IWMS that is fully web based, mobile accessible, highly configurable, and capable of seamless integration with existing enterprise systems. The current system does not meet these expectations, particularly in areas such as unified work and asset management, modern space management, preventive maintenance, inventory and utility tracking, and support for contemporary authentication standards including SAML 2.0, OpenID Connect, and MFA for privileged users.-*010-RFP-IT-SolutionRequirements*-class IWMS that is fully web-based, mobile-accessible, highly configurable, and capable of seamless integration with existing enterprise systems. The current system does not meet these expectations, particularly in areas such as unified work and asset management, modern space management, preventive maintenance, inventory and utility tracking, and support for contemporary authentication standards including SAML 2.0, OpenID Connect, and MFA for privileged users.

For these reasons, UMS is pursuing a replacement solution that is already built, fully deployable, and capable of meeting the complete functional scope at the time of implementation. Solutions requiring new development, beta features, or functionality dependent on future product releases would not meet the requirements of this RFP and will be deemed non-responsive.

Wherever possible in addition to answering the questions detailed in 05 - 2026-010-RFP-IT-SolutionRequirements we encourage Respondent(s) to clarify what your solution supports in more detail in your 03 - 2026-010-RFP-IT-RFP-SubmissionFormPackage Appendix I and J answers.

University currently utilizes PeopleSoft for its ERP, HR and financial system

Vendor Question	Appendix H: Supporting Requirement(s)	UMS Answer
Why is UMS replacing their current AssetWorks system?	Overview (Operational Needs 1–8)	UMS is seeking a modern, fully integrated IWMS that meets current operational, reporting, integration, and mobility requirements that the existing system cannot fully support. The new solution must be fully built, deployable, and nondevelopment dependent (Req. 125).-development-dependent (Req. 125).
Integrate with Jaggaer – What is the extent of this integration?	Req. 15 (Jaggaer interface), Req. 120 (APIs), Req. 121 (real-time/scheduled sync), Req. 126 (middleware compatibility)-time/scheduled sync), Req. 126 (middleware compatibility)	Respondents must describe their system's integration capabilities, including supported technologies and methods (e.g., REST/SOAP APIs, real-time web services, flat file exchange, scheduled batch processing, middleware compatibility, etc.). Vendors should indicate whether integrations are real-time, near real-time, or batch-based, and describe typical implementation approaches used with third-party procurement and ERP systems such as Jaggaer and PeopleSoft. Specific data elements and integration workflows will be finalized during implementation.

Vendor Question	Appendix H: Supporting Requirement(s)	UMS Answer
Billing mechanism – Can you clarify what this entails?	Req. 5, Req. 33, Req. 62–65 (utilities/chargeback), Req. 16–20 (cost tracking)	Billing includes internal chargeback workflows, cost allocation for labor/materials, rental administration, and utility chargeback. It does not include vendor payment processing.
Provide building asset management services & integrate with AM system — do you want an integration or a provided solution?	Req. 1, Req. 28, Req. 34–43	UMS requires a complete asset management solution within the IWMS, not a dependency on a third-party AM system. Integration capability is required only if campuses maintain supplemental systems. -party AM system. Integration capability is required only if campuses maintain supplemental systems.
Integrate with PM/inventory modules — do you want proponents to provide these modules or integrate with third-party systems?-party systems?	Req. 26, Req. 49, Req. 51–60	UMS requires native PM and inventory modules within the IWMS. Integration capability is required only for optional campus specific systems..
Handle billing/rental admin — please provide more detail.	Req. 33, Req. 5, Req. 62–65	Includes internal billing, rental charges, utility chargeback, and cost allocation of workflows. Does not include external vendor payment processing.
What types of scheduled events should be displayed on the calendar?	Req. 31, Req. 60	PM schedules, work orders, inspections, and other scheduled maintenance activities.
Does UMS use a facility event management system that requires integration?	Req. 31, Req. 120–121	UMS does not require integration with a separate event management system for this requirement. Calendar display is limited to IWMS related to scheduled work.-management system for this requirement. Calendar display is limited to IWMS-related scheduled work.
Which ERP, HR, and financial systems require API based integration?-based integration?	Req. 120–121, Req. 126	UMS requires integration with its enterprise ERP, HR, and financial systems. Specific platforms and integration methods (API, SFTP, and middleware) will be confirmed during implementation.
What third-party software integrations need to be considered for initial implementation?-party software integrations need to be considered for initial implementation?	Req. 15, Req. 28, Req. 120–126	Respondents must describe their system's integration capabilities, including supported technologies and methods (e.g., REST/SOAP APIs, real-time web services, flat file exchange, scheduled batch processing, middleware compatibility, etc.). Vendors should indicate whether integrations are real-time, near real-time, or batch-based, and describe typical implementation approaches used with third-party procurement and ERP systems such as Jaggaer and PeopleSoft. Specific data elements and integration workflows will be finalized during implementation.
Is there a separate system used for Asset Management that the IWMS must integrate with?	Req. 1, Req. 28, Req. 34–43	UMS expects the IWMS to serve as the primary asset management system. Some campuses may maintain supplemental datasets that will be mapped or imported.
Req. 113 – Elaborate on proprietary formats.	Req. 113	Proprietary formats include legacy FM platform exports (e.g., AiM specific formats) that are not standard for CSV/XLSX/XML. The IWMS must convert these during migration.-specific formats) that are not standard CSV/XLSX/XML. The IWMS must convert these during migration.
Req. 7 – Is this requirement a summary of items 62–65?	Req. 7, Req. 62–65	Requirement 7 is broader: it requires an energy management solution, which includes utilities but also supports sustainability reporting, consumption analysis, and forecasting.
Req. 5 – What elements are included in "billing"?	Req. 5, Req. 33, Req. 62–65	Billing includes internal chargeback, rental billing, utility chargeback, and cost allocation—not vendor payment processing.

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Req. 3 – Is this a summary of items 40–43?	Req. 3, Req. 40–43	Yes. Requirement 3 is the high-level statement; 40–43 defines the detailed capabilities needed for capital condition and reinvestment planning.-level statement; 40–43 define the detailed capabilities needed for capital condition and reinvestment planning.
Req. 15 – What integration capabilities does Jaggaer provide?	Req. 15, Req. 120–121, Req. 126	Jaggaer supports API based and file-based integrations. Specific fields (supplier, contract, procurement data) will be finalized during implementation-based and file-based integrations. -based and file-based integrations. Specific fields (supplier, contract, procurement data) will be finalized during implementation. Respondents must describe their system's integration capabilities, including supported technologies and methods (e.g., REST/SOAP APIs, real-time web services, flat file exchange, scheduled batch processing, middleware compatibility, etc.). Vendors should indicate whether integrations are real-time, near real-time, or batch-based, and describe typical implementation approaches used with third-party procurement and ERP systems such as Jaggaer and PeopleSoft. Specific data elements and integration workflows will be finalized during implementation.
Req. 53 – What usage metrics trigger PM?	Req. 53	Usage-based PM may include hours of operation, cycles, mileage, or meter readings. Data may be manually entered or imported from metering systems.-based PM may include hours of operation, cycles, mileage, or meter readings. Data may be manually entered or imported from metering systems.
Req. 62 – Does adding fields at any level meet the requirements?	Req. 62–65	No. Requirement 62 requires utility management functionality, not just fields. The system must track accounts, consumption, cost, and reporting.
Req. 65 – Is this manual entry or integration with BAS?	Req. 65	Both must be supported. Manual entry and automated imports from meters/BAS where available.
Req. 102 – Examples of existing reports?	Req. 102	Examples include inventory valuation reports, asset financial summaries, and audit ready inventory listings.-ready inventory listings.
Req. 103 – Examples of existing reports?	Req. 103	Examples include depreciation schedules, asset aging reports, and financial statement support reports.
Req. 107 – Is this asking about importing historical/active datasets from AiM?	Req. 107	Yes. Historical and active asset datasets from AiM must be migrated.
Req. 109 – Provide list of buildings/floors and formats; phased approach?	Req. 109	UMS will provide building/floor lists and CAD/PDF/Excel formats during implementation. CAD polylines vary by campus. Floor plan integration may be phased.
Req. 66 – How many mobile workers need concurrent access?	Req. 66–70	UMS will provide counts during implementation; the system must support concurrent mobile access with offline capability.
Req. 2 – Does this require IoT occupancy sensors?	Req. 2	No. Requirement 2 covers static space inventory and campus profiles. IoT occupancy is not required.
What are your current pain points, gaps, challenges?	Overview	UMS seeks improved integration, mobility, reporting, asset lifecycle management, and data migration capabilities beyond what the current system supports.

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Is the ask for on Prem or SaaS?-prem	Req. 10, Req. 124, Req. 125	UMS requires a SaaS cloud-hosted option that is fully built and deployable at contract award. On Prem is not required.-prem is not required.
Are there specific software requirements or constraints?	Req. 120–126	Must support APIs, SSO/MFA, modern security standards, and non-development dependent functionality.-development-dependent functionality.
Can we submit proposals for both cloud and on-prem options?	Req. 125	UMS requires a SaaS cloud-hosted option that is fully built and deployable at contract award.
Does UMS plan to initially implement new or existing workflows?	Req. 1–8 (Operational Needs), Req. 125 (No development dependent solutions)-dependent solutions)	UMS will implement a combination of existing and newly developed workflows. Existing workflows will be migrated only if they align with best practices and meet functional requirements. New workflows will be required where the current system lacks capability. All required workflows must be fully built and deployable at contract award.
How does UMS currently use Jaggaer, and what is the scope of integration?	Req. 15 (Jaggaer interface), Req. 120–121 (API integration), Req. 126 (middleware compatibility)	UMS uses Jaggaer for suppliers, contracts, sourcing, and procurement functions. The IWMS must interface with Jaggaer's supplier module to exchange vendor, contract, and procurement related data. Integration must use Jaggaer supported methods (API or file based). Specific fields will be finalized during implementation.-related data. Integration must use Jaggaer-supported methods (API or file-based). Specific fields will be finalized during implementation.
Does UMS want to incorporate floor plans or 3D asset models into the IWMS (e.g., marking assets on floor plans)?	Req. 2 (Space & campus profile), Req. 109 (CAD/PDF/Excel migration), Req. 34–43 (Asset management)	Yes. UMS requires floor plans to be incorporated into the IWMS and supports asset to floorplan mapping. 3D models are not required. Floor plans will be provided in CAD/PDF/Excel formats as available.-to-floor-plan mapping. 3D models are not required. Floor plans will be provided in CAD/PDF/Excel formats as available.
Does UMS want the proposed system to integrate with any 3rd-party financial software?	Req. 120 (APIs for ERP/HR/financial), Req. 121 (real-time/scheduled sync), Req. 5 (billing), Req. 33 (rental/billing admin)-time/scheduled sync), Req. 5 (billing), Req. 33 (rental/billing admin)	Yes. The IWMS must integrate with UMS's enterprise financial system for cost tracking, chargeback, and reconciliation. Specific platforms and integration methods will be confirmed during implementation.
5Does UMS require on-site services for building asset management, or is this about software capability?	Req. 1 (asset management services), Req. 34–43 (asset data), Req. 107 (asset dataset migration)	This requirement refers to software capability, not on-site physical asset tagging or inventory services. UMS will provide existing asset data for migration.
Which integrations are mandatory for go live?-live?	Req. 15, Req. 28, Req. 120–126	Mandatory integrations include: (1) ERP/financial system, (2) Jaggaer supplier module, and (3) any required data migration from the existing IWMS (AiM). Additional integrations (e.g., BAS/metering) depend on campus specific availability.-specific availability.
Does the proposed solution require CAD migration? Will UMS provide compatible CAD drawings?	Req. 109 (facility space plans), Req. 112–115 (import formats, validation, audit)	Yes. CAD migration is required. UMS will provide CAD, PDF, or Excel floor plans in available formats. CAD files may vary in polyline completeness; this will be reviewed during implementation.
Based on the integrations identified, what level of integration is required (real-time API vs. flat file)?-time API vs. flat file)?	Req. 120 (documented APIs), Req. 121 (real-time/scheduled sync), Req. 126 (middleware compatibility)-time/scheduled sync), Req. 126 (middleware compatibility)	The IWMS must support both real-time API-based integration and scheduled/flat file exchange. The specific method will depend on the capabilities of each external system and will be finalized during implementation.-time API-based integration and scheduled/flat-file exchange. The specific method will depend on the capabilities of each external system and will be finalized during implementation.
What other systems need to be integrated with the solution?	Req. 15, Req. 28, Req. 62–65, Req. 120–126	Known systems include: Jaggaer, PeopleSoft ERP/HR/financial systems, existing IWMS (AiM) for migration, and campus specific metering/BAS systems where data feeds exist. UMS will confirm all integrations during implementation planning.-specific metering/BAS

Vendor Question	Appendix H: Supporting Requirement(s)	UMS Answer
		systems where data feeds exist. UMS will confirm all integrations during implementation planning.
What system is the master of your data? Locations (property, building, spaces, etc)	Req. 2, 91, 109	AiM + campus space inventories
What system is the master of your data? Cost Codes	Req. 5, 33, 61, 120–121	ERP/Financial System
What system is the master of your data? Organization Hierarchy	Req. 120–121, 126	ERP/HR
What system is the master of your data? People	Req. 14, 120–121	HR System
What system is the master of your data? Assets (Equipment)	Req. 1, 28, 34–43, 107	AiM + campus datasets
What processes are to be considered for inclusion in the new system? Move Management	Req. 2, 31, 91, 109	UMS requires the IWMS to support space and campus profile management, floor plan integration, and scheduled events. Move management is supported through space tracking, location-based reporting, and floor plan visualization.-based reporting, and floor plan visualization.
What processes are to be considered for inclusion in the new system? Space Allocation & Chargeback	Req. 2, 5, 33, 61, 62–65, 91	The IWMS must support space inventory, space assignment, and internal chargeback processes. Utility chargeback, rental billing, and cost allocation of workflows are included.
What processes are to be considered for inclusion in the new system? Reservations	Req. 31, 90	The IWMS must display scheduled events on a calendar and support facility for scheduling reports. UMS does not require integration with a separate event management system for this purpose.-management system for this purpose.
What processes are to be considered for inclusion in the new system? Hoteling	Req. 2, 31, 91	While not explicitly named, hoteling is supported through space profiles, location-based reporting, and calendar-based scheduling capabilities.-based reporting, and calendar-based scheduling capabilities.
What processes are to be considered for inclusion in the new system? Space Tracking	Req. 2, 34–43, 91, 109	Space tracking is a core requirement. The IWMS must maintain building, floor, and room data; support CAD/PDF/Excel floor plan migration; and provide location-based reporting.-based reporting.
What processes are to be considered for inclusion in the new system? Strategic Planning	Req. 3, 40–43, 62–65, 97–101	Strategic planning is supported through capital condition assessment, long-range capital planning, utility analytics, and forecasting reports.-range capital planning, utility analytics, and forecasting reports.
What processes are to be considered for inclusion in the new system? Auditing	Req. 111–116, 122–123	The IWMS must support pre and post import validation, audit trails, timestamped logs, and full data reconciliation. These capabilities support internal and external audit requirements. and post import validation, audit trails, timestamped logs, and full data reconciliation. These capabilities support internal and external audit requirements.- and post-import validation, audit trails, timestamped logs, and full data reconciliation. These capabilities support internal and external audit requirements.
Question 1: What are the University of Maine System's space management requirements? Question 2: Describe your general space management usage.	Req. 2, 91, 109	Space & Campus Profile Management: The IWMS must maintain a complete inventory of campuses, properties, buildings, floors, and rooms, including attributes such as space type, use, area, and occupancy. The system must support CAD/PDF/Excel floor plan migration and allow UMS to maintain accurate, UpToDate space profiles.-to-date space profiles.

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Question 1: What are the University of Maine System's space management requirements? Question 2: Describe your general space management usage.	Req. 2, 109	Floor Plan Integration: The IWMS must incorporate floor plans and support visual navigation of buildings and spaces. UMS will provide CAD/PDF/Excel files in available formats. The system must support mapping assets, rooms, and space attributes to floor plans.
Question 1: What are the University of Maine System's space management requirements? Question 2: Describe your general space management usage.	Req. 2, 34–43, 91	Space Tracking & Utilization: The system must track space assignments, occupancy, departmental ownership, and changes over time. It must support location-based reporting at the campus, building, floor, and room levels.
Question 1: What are the University of Maine System's space management requirements? Question 2: Describe your general space management usage.	Req. 5, 33, 61, 62–65	Space Allocation & Chargeback: The IWMS must support internal chargeback processes, including space-based cost allocation, rental billing, and utility chargeback. Space allocation changes must be reflected in billing and reporting.-based cost allocation, rental billing, and utility chargeback. Space allocation changes must be reflected in billing and reporting.
Question 1: What are the University of Maine System's space management requirements? Question 2: Describe your general space management usage.	Req. 2, 31, 91, 109	Move Management: The system must support planning and tracking of moves, including space assignments, occupancy changes, and scheduled move events.
Question 1: What are the University of Maine System's space management requirements? Question 2: Describe your general space management usage.	Req. 31, 90	Reservations & Hotelling (Flexible Workspace): The IWMS must support calendar-based scheduling for space reservations and events. Hotelling is supported through space profiles and scheduling capabilities, though UMS does not require integration with a separate event management system.-based scheduling for space reservations and events. Hotelling is supported through space profiles and scheduling capabilities, though UMS does not require integration with a separate event-management system.
Question 1: What are the University of Maine System's space management requirements? Question 2: Describe your general space management usage.	Req. 3, 40–43, 62–65, 97–101	Strategic Space Planning: The IWMS must support long-range planning, including capital reinvestment, condition assessment, utility analytics, and forecasting. Space data must be integrated with asset and capital planning modules.-range planning, including capital reinvestment, condition assessment, utility analytics, and forecasting. Space data must integrate with asset and capital planning modules.
Question 1: What are the University of Maine System's space management requirements? Question 2: Describe your general space management usage.	Req. 111–116, 122–123	Auditing & Compliance: The system must maintain audit trails, timestamped logs, and validation tools to support internal and external audits of space data, changes, and reporting.
Do you currently have space classifications, if so please provide some examples?	Req. 2 – Space & Campus Profile Req. 34–35 – Asset/space classification lists	Yes. UMS currently maintains space classifications across all campuses as part of its space inventory and reporting processes. These classifications are used for space tracking, utilization analysis, chargeback, and strategic planning. The new IWMS must support importing, maintaining, and reporting on these classifications.

Vendor Question	Appendix H: Supporting Requirement(s)	UMS Answer
	Req. 91 – Location based reporting-based reporting Req. 109 – CAD/PDF/Excel space plan migration	UMS uses a combination of standard higher education space categories and campus specific subclassifications. Examples include:-education space categories and campus-specific sub-classifications. Examples include: **Academic & Instructional:** Classrooms, Class labs, Open labs, Seminar rooms, Lecture halls: **Research:** Research labs, Research support rooms, Specialized research facilities **Office & Administrative:** Faculty Offices, Staff offices, Shared offices, administrative offices, Conference rooms **Student Support:** Student lounges, Advising centers, tutoring spaces, study rooms, housing **Facilities & Infrastructure**: Mechanical rooms, electrical rooms, custodial closets, storage rooms, utility spaces **Athletic & Recreation:** Gyms, Fitness Rooms, Locker rooms, training rooms
Question 1: Does UMS require a sandbox environment for the CMMS? Question 2: How many NON-PRODUCTION Environments that you prefer to have?	**Req. 111–116** – Data import validation, audit, reconciliation **Req. 120–121** – API based integrations and scheduled/real time syncs-based integrations and scheduled/real-time syncs **Req. 122–123** – Full edit history and timestamped logs **Req. 125** – Fully built, deployable solution (sandbox required for testing)	The sandbox environment must: • Mirror production functionality • Allow UMS to test integrations, workflows, and data imports • Support training for end users and administrators • Operate independently from production to avoid data contamination UMS anticipates maintaining this environment for the life of the contract. ***Please price this option separately.***
What is the form/format of existing asset data for migration?	Req. 1, 28, 34–43, 107–113	CSV, XLSX, XML, AiM exports, PDFs, JPG/PNG, CAD/PDF/Excel floor plans, proprietary formats.
Are there existing workflows that define business processes related to the maintenance of various asset types?	Req. 1, 26, 34–43, 51–60, 105, 107–110	Yes. UMS maintains PM, corrective maintenance, lifecycle, warranty, compliance, inventory, and audit workflows. These will be migrated and standardized in the new IWMS.
Does UMS have an existing library of PM procedures to be loaded into the system? Are they available for all asset classes?	Req. 51–60, 107–110	Yes. UMS maintains PM procedures for major asset classes. Coverages vary by campus. All available procedures will be provided for migration.
What are the top pain points faced by UMS when utilizing AiM to manage facility operations?	Overview; Req. 1–8; Req. 125	Limited integration, mobility, reporting, and lifecycle management capabilities. UMS seeks a modern, fully integrated IWMS.

Vendor Question	Appendix H: Supporting Requirement(s)	UMS Answer
Can you elaborate on the desired billing functionality? Internal purchase orders? Vendor quotes/invoices?	Req. 5, 33, 62–65, 16–20	Billing includes internal chargeback, rental billing, utility chargeback, and cost allocation. UMS does not require vendor quote/invoice management in the IWMS.
Desired functionality for sustainability planning and reporting?	Req. 6, 7, 62–65, 97–101	UMS requires utility tracking, consumption analysis, cost reporting, forecasting, and sustainability metrics aligned with energy management.
How are asset deficiency data and cost models currently managed?	Req. 3, 40–43	Managed through condition assessments, spreadsheets, and AiM based deficiency records. IWMS must support import and long-range capital planning.-based deficiency records. IWMS must support import and long-range capital planning.
What is “vendor supplied assessment data”?-supplied assessment data”?	Req. 40–43	Refers to data from vendor performed Facility Condition Assessments or asset inventory audits. IWMS must map and import these datasets.-performed Facility Condition Assessments or asset inventory audits. IWMS must map and import these datasets.
Desired functionality for AI based document and image reading on mobile devices?-based document and image reading on mobile devices?	Req. 71	Extract text from photos, read labels/serial numbers, interpret documents, and attach structured data to work orders or assets.
Do comments/pictures for historical work orders need migration? What work order data must migrate?	Req. 16–25, 51–60, 107–110, 113	Yes. UMS requires migration of work order history, labor, materials, status, dates, PM links, comments, and attachments where feasible.
How does UMS want to utilize facility space plans in the IWMS? What data will be captured?	Req. 2, 91, 109	Floor plans will support navigation, space validation, asset placement, move planning, and reporting. CAD/PDF/Excel formats will be provided.
What channels are used to report requests/issues?	Req. 8, 23, 32, 66–70	Requests come via phone, email, web forms, and campus request portals. IWMS must support multi-channel intake.
Does UMS maintain help desk operations for facilities management?	Req. 8, 23, 32	Yes. Help desk functions exist and must be supported through request intake and work order routing.
Are FM workflows standardized across all UMS campuses?	Req. 105, 125	Core workflows are similar, but variations exist. The new IWMS will support standardization.
Do you model from or utilize IFMA/BOMA space measurement standards?	Req. 2, 109	UMS aligns with higher education space standards and will validate alignment during implementation.-education space standards and will validate alignment during implementation.
Do you have drawings? What format?	Req. 109	Yes. CAD (DWG/DXF), PDF, and Excel formats exist across campuses.

Vendor Question	Appendix H: Supporting Requirement(s)	UMS Answer
Are your drawings polylined?	Req. 109	Polyline completeness varies by campus. Some CAD files are fully polyline; others require cleanup.
Primary goals for implementing TRIRIGA for space management?	Req. 2, 91, 109	Improve accuracy, reporting, planning, chargeback, and integration of space data across campuses.
How do you conduct space planning for new layouts, expansions, and downsizing?	Req. 2, 31, 91, 109	Conducted using floor plans, spreadsheets, and campus planning tools. IWMS must centralize and streamline this.
How do you track move management?	Req. 2, 31, 91	Moves are tracked through spreadsheets and campus processes. IWMS must support move planning and scheduling.
Do you need a Reservation Management system?	Req. 31, 90	Yes. Calendar based scheduling for rooms and events is required.-based scheduling for rooms and events is required.
Where is lease administration data maintained?	Req. 2, 91	Maintained in campus systems and spreadsheets. IWMS must support centralized lease tracking.
Are long-term capital planning outputs expected from FCA data?-term capital planning outputs expected from FCA data?	Req. 3, 40–43	Yes. IWMS must support capital forecasting and reinvestment planning.
Are self-service requests required for business users?-service requests required for business users?	Req. 8, 23	Yes. IWMS must support requester self-service portals.-service portals.
Are chargebacks or approvals tied to moves?	Req. 5, 33, 61, 62–65	Yes. Moves may trigger chargeback or approval of workflows.
Are move scenarios complex (multi-department, phased)?	Req. 2, 31, 91	Yes. IWMS must support multi-phase, multi-department moves.
Where do you maintain O&M information today?	Req. 4, 13, 107–110	O&M manuals and documents are stored in AiM and campus file repositories.
Do you track both Preventive and Corrective maintenance?	Req. 16–25, 51–60	Yes. Both PM and corrective maintenance are tracked today.
Do you maintain Service Plans, Procedures, Reading Groups, Assignment Matrix, Job Plans, Schedules, Service Agreements?	Req. 51–60, 105, 107–110	Yes. Coverages vary by campus. IWMS must support all listed structures.
What types of service requests can a user raise?	Req. 8, 23, 32	General maintenance, custodial, grounds, IT related FM requests, safety issues, and urgent repairs.-related FM requests, safety issues, and urgent repairs.
Do you track work time and cost estimates?	Req. 14, 16–20, 27	Yes. Labor hours, material costs, and estimates are tracked.

Vendor Question	Appendix H: Supporting Requirement(s)	UMS Answer
How do you invoice the service provider?	Req. 5, 33, 62–65	UMS uses ERP/financial systems for vendor invoicing. IWMS supports internal chargeback only.
Is Uniformat II the standard for all building asset systems and sub-systems?	Req. 1 (Asset Management), Req. 34–35 (Asset classification), Req. 40–43 (Condition assessment data), Req. 28 (Integration with AM system)	Yes. UMS generally aligns its asset classification and building system organization with industry recognized standards, including Uniformat II. Uniformat II serves as the primary framework for organizing building systems and subsystems across campuses. Some campuses maintain supplemental or legacy classifications, which will be mapped to the standardized structure during implementation. The IWMS must support a Uniformat II–based hierarchy and allow mapping of existing classifications into that structure.-recognized standards, including Uniformat II. Uniformat II serves as the primary framework for organizing building systems and sub-systems across campuses. Some campuses maintain supplemental or legacy classifications, which will be mapped to the standardized structure during implementation. The IWMS must support a Uniformat II–based hierarchy and allow mapping of existing classifications into that structure.
Is it the intention that utility data in this section is imported from another source system, or is the requirement to provide fields to manually enter this information?	Req. 62–65 (Utility management), Req. 112–113 (Import formats & proprietary conversions), Req. 120–121 (Integrations), Req. 125 (Fully built, deployable solution)	UMS requires the IWMS to support **both** methods. Where utility providers or campus systems can supply digital data (e.g., interval data, billing files, metering/BAS feeds), the IWMS must support automated or semi-automated imports. The system must also allow **manual entry or adjustment** of utility billing, consumption, and meter data when automated feeds are not available. The specific mix of imported vs. manually entered data will depend on provider capabilities and campus practices and will be finalized during implementation.
How does UMS want utility data to be tracked in the IWMS? Manual entry, upload of utility bills, integration with meters, etc.?	Req. 62–65 (Utility management), Req. 112–113 (Import formats & proprietary conversions), Req. 120–121 (Integrations), Req. 125 (Fully built, deployable solution)	UMS requires the IWMS to support **multiple utility data intake methods**. The system must allow: (1) **Manual entry** of utility consumption, billing determinants, and meter readings; (2) **Upload of utility bills** or billing files from providers; and (3) **Integration with metering or BAS systems** where digital feeds exist. The specific mix of manual vs. automated data entry varies by campus and provider capability. The IWMS must support all three methods without custom development. **-data intake methods**
What system does UMS currently use to manage utility bills?	Req. 62–65 (Utility management), Req. 107–110 (Data migration), Req. 112–113 (Import formats), Req. 125 (Fully built, deployable solution)	UMS currently manages utility billing information through its **existing IWMS (AiM)** and a combination of **campus level processes and provider generated files**. Utility data may exist in structured database tables, exported reports, or billing files depending on the utility type and campus practices. The new IWMS must support migration of all relevant historical and active utility datasets and provide the ability to track accounts, billing periods, consumption, rates, and building level costs. The specific structure and source of utility data will be reviewed with the awarded vendor during implementation to ensure accurate mapping and integration.**-level processes and provider-generated files**-level costs. The specific structure and source of utility data will be reviewed with the awarded vendor during implementation to ensure accurate mapping and integration.
Can you list all the different types of utilities that need to be tracked in the system?	Req. 62–65 (Utility management), Req. 2 (Space & campus profile), Req. 107–110 (Data migration), Req. 125 (Fully built, deployable solution)	UMS requires the IWMS to track a comprehensive set of utilities across all campuses. Utility types include **electric, gas, water, sewer, fuel, oil, propane, trash/waste services, and telephone/telecommunications**, as well as other utility types applicable to specific campuses. The IWMS must support tracking of utility accounts, vendors, billing periods, consumption, rates, building level costs, and internal chargeback data

Vendor Question	Appendix H: Supporting Requirement(s)	UMS Answer
		for each utility type.-level costs, and internal chargeback data for each utility type.
How many utility accounts receive monthly bills, and how many total meters/submeters are included in those bills?	Req. 62–65 (Utility management), Req. 107–110 (Data migration), Req. 2 (Space & campus profile), Req. 125 (Fully built, deployable solution)	UMS manages a significant number of utility accounts across its campuses, and many of these accounts receive monthly billing. The total number of utility accounts and associated meters/submeters varies by campus and utility type. Because utility data is currently maintained through a combination of the existing IWMS, provider generated files, and campus level processes, **final counts will be confirmed during discovery with the awarded vendor**. The IWMS must support tracking all utility accounts, meters, and submeters—regardless of quantity—and must accommodate all utility types identified in the Solution Requirements. -generated files, and campus-level processes,
How will data relate to energy management (utility bills, BMS/BAS data, sensors, etc.) be made available to the IWMS?	Req. 62–65 (Utility & energy management), Req. 112–113 (Import formats & proprietary conversions), Req. 120–121 (API integrations), Req. 125 (Fully built, deployable solution)	UMS expects energy-related data to be made available to the IWMS through **multiple intake methods**, depending on the source system and campus capabilities. Utility bills and consumption data may be uploaded or imported from provider-generated files. Where Building Management Systems (BMS/BAS), metering platforms, or sensor networks provide digital data feeds, the IWMS must support **API based or scheduled file-based integrations**. Manual entry must also be supported for cases where automated data is not available. The specific integration approach for each campus and utility type will be finalized during implementation. Related data to be made available to the IWMS through generated files. -related data to be made available to the IWMS through -generated files. Where Building Management Systems (BMS/BAS), metering platforms, or sensor networks provide digital data feeds, the IWMS must support **-based or scheduled file-based integrations**
Is energy management currently done in AiM? If not, what systems are used for energy management?	Req. 62–65 (Utility & energy management), Req. 107–110 (Data migration), Req. 112–113 (Import formats), Req. 120–121 (Integrations), Req. 125 (Fully built, deployable solution)	Energy management is **partially** supported by AiM today, primarily through utility account records, limited consumption tracking, and campus-maintained datasets. However, AiM is **not** used as a comprehensive energy management platform across all campuses. Additional energy related data—such as interval meter readings, BAS/BMS data, and sensor generated information—is maintained in **campus specific systems**, provider portals, spreadsheets, and building automation platforms. The new IWMS must consolidate these sources by supporting manual entry, file uploads, and integrations with BAS/metering systems where available for maintained datasets. -maintained datasets. However, -management platform across all campuses. Additional energy-related data—such as interval meter readings, BAS/BMS data, and sensor-generated information—is maintained in **-specific systems**
Can you elaborate on the desired energy management functionality? (e.g., utility bill analytics, real-time asset monitoring, fault detection & diagnostics, measurement & verification, etc.)	Req. 6–7 (Energy & sustainability), Req. 62–65 (Utility & energy management), Req. 97–101 (Reporting & analytics), Req. 120–121 (Integrations), Req. 125 (Fully built, deployable solution)	UMS requires the IWMS to support a broad set of energy management capabilities. Core expectations include **utility bill analytics**, consumption and cost trending, benchmarking across buildings and campuses, and support for sustainability reporting. Where metering or BAS/BMS data is available, the IWMS must support **integration for interval data, real-time monitoring, and measurement & verification of workflows**. UMS does not require full fault detection & diagnostics (FDD) as a baseline capability, but the IWMS must be able to ingest data from systems that provide FDD outputs. The system must support dashboards, KPIs, and reporting aligned with UMS's energy and sustainability goals.-management capabilities. Core expectations **-time monitoring, and measurement & verification workflows**

Vendor Question	Appendix H: Supporting Requirement(s)	UMS Answer
For items like billing/budget codes/chargeback, is there an integration expected with a financial system?	Req. 5 (Billing & chargeback), Req. 14 (Labor rates), Req. 33 (Rental billing), Req. 62–65 (Utility chargeback), Req. 120–121 (Integrations), Req. 125 (Fully built, deployable solution)	Yes. UMS expects the IWMS to integrate with the University's enterprise financial system for billing related data such as budget codes, cost centers, labor rates, and internal chargeback information. The IWMS will not process vendor payments, but it must exchange financial related data to support accurate cost tracking, reconciliation, and internal billing workflows. The specific integration method (API, middleware, or scheduled file exchange) will be finalized during implementation based on vendor capabilities and UMS financial system requirements (related data such as budget codes, cost centers, labor rates, and internal chargeback information). The IWMS will not process vendor payments, but it must exchange financial related data to support accurate cost tracking, reconciliation, and internal billing workflows. The specific integration method (API, middleware, or scheduled file exchange) will be finalized during implementation based on vendor capabilities and UMS financial system requirements.-related data such as budget codes, cost centers, labor rates, and internal chargeback information. The IWMS will not process vendor payments, but it must exchange financial-related data to support accurate cost tracking, reconciliation, and internal billing workflows. The specific integration method (API, middleware, or scheduled file exchange) will be finalized during implementation based on vendor capabilities and UMS financial system requirements.
Does UMS intend to process bill payments in the system?	Req. 5 (Billing & chargeback), Req. 14 (Labor rates), Req. 33 (Rental billing), Req. 62–65 (Utility chargeback), Req. 120–121 (Integrations)	No. UMS does **not** intend to process vendor bill payments within the IWMS. All financial transactions, including vendor payments, are handled through UMS's enterprise financial systems. The IWMS must support accurate cost tracking, internal chargeback, and the exchange of billing related data (e.g., budget codes, labor/material costs, utility chargeback), but it will not serve as a payment processing platform.-related data (e.g., budget codes, labor/material costs, utility chargeback), but it will not serve as a payment-processing platform.
Are FM-related budget codes managed at a campus level or UMS level? Any insight you can give on how UMS wants to utilize budget codes in the IWMS will be helpful. -related budget codes managed at a campus-level or UMS-level? Any insight you can give on how UMS wants to utilize budget codes in the IWMS will be helpful.	Req. 5 (Billing & chargeback), Req. 14 (Labor rates), Req. 33 (Rental billing), Req. 62–65 (Utility chargeback), Req. 120–121 (Integrations), Req. 125 (Fully built, deployable solution)	FM-related budget codes are managed at **both the campus level and the UMS system level**, depending on the type of work, funding source, and organizational structure. The IWMS must support a flexible budget code framework that accommodates campus specific accounting practices while maintaining alignment with UMS level financial governance. UMS intends to use budget codes in the IWMS to support accurate cost tracking for labor, materials, inventory, utilities, and work orders; internal chargeback workflows; rental billing; and integration with the enterprise financial system for reconciliation and reporting. -related budget codes are managed at -code framework that accommodates campus-specific accounting practices while maintaining alignment with UMS-level financial governance. UMS intends to use budget codes in the IWMS to support accurate cost tracking for labor, materials, inventory, utilities, and work orders; internal chargeback workflows; rental billing; and integration with the enterprise financial system for reconciliation and reporting.
Can UMS elaborate on what data might need to be converted from proprietary formats?	Req. 107–113 (Data migration, import formats, proprietary conversions), Req. 1, 28, 34–43 (Asset & equipment data), Req. 16–25, 51–60 (Work orders & PM), Req. 109 (Space plans), Req. 125 (Fully built, deployable solution)	UMS maintains several datasets in formats that may be proprietary or vendor specific within the current IWMS (AiM) and related systems. Data requiring conversion may include asset records, PM schedules, work order history, labor/material entries, inventory data, utility billing data, and workflow configuration elements stored in Aim native structures. Attachments such as O&M manuals, photos, and documents may also be stored in proprietary attachment frameworks. Some CAD files contain embedded metadata or legacy formatting that may require transformation. The IWMS must support conversion of all such

Vendor Question	Appendix H: Supporting Requirement(s)	UMS Answer
		proprietary formats to ensure complete and accurate migration. -specific within the current IWMS (-native structures. Attachments such as O&M manuals, photos, and documents may also be stored in proprietary attachment frameworks. Some CAD files contain embedded metadata or legacy formatting that may require transformation. The IWMS must support conversion of all such proprietary formats to ensure complete and accurate migration.
Will you provide the data in our format? (For example, if we provide an Excel template)	Req. 107–113 (Data migration, import formats, proprietary conversions), Req. 125 (Fully built, deployable solution)	Yes. UMS will provide all required data in the vendor's preferred import format, including Excel templates or structured data layouts, if the templates are provided early in the implementation process. UMS can extract data from AiM and related systems and will work with the awarded vendor to map fields, validate formats, and ensure compatibility with the IWMS import requirements. The vendor must clearly define required templates, field structures, and data rules to support accurate migration.
As part of the migration process, do you have any documents that need to be migrated to the new system? If so, could you please provide an estimate of the number of documents, their file formats, and their current location?	Req. 107–116 (Data migration, document migration, attachments), Req. 4, 13 (O&M documentation), Req. 16–25, 51–60 (Work orders & PM), Req. 109 (Space plans), Req. 125 (Fully built, deployable solution)	Yes. UMS maintains a substantial volume of documents that must be migrated into the new IWMS. These include O&M manuals, warranties, PM procedures, work order attachments, asset documentation, utility files, space plans, and other facilities related records. Documents exist in multiple formats—primarily **PDF, Word, Excel, image files (JPEG/PNG), CAD formats (DWG/DXF), and multimedia attachments**. They are currently stored within **AiM's attachment framework**, campus network drives, SharePoint sites, and other departmental repositories. UMS will work with the awarded vendor during discovery to validate document counts and finalize migration scope, ensuring all required documents are transferred accurately and securely related records. -related records. Documents exist in multiple formats—primarily
What is the University of Maine System's expected overall timeline for the implementation, from project kickoff through production go live?-live?	Req. 118–125 (Implementation, deployment, vendor readiness), Req. 107–113 (Data migration), Req. 120–121 (Integrations), Req. 125 (Fully built, deployable solution)	UMS anticipates a **phased implementation** beginning with project kickoff, followed by discovery, configuration, data migration, integrations, testing, training, and production deployment. The exact timeline will depend on the vendor's solution, maturity, and implementation approach. Final sequencing and duration will be established collaboratively with the awarded vendor during project planning.
What will be the time period UMS wants the implementation to be completed in?	Req. 118–125 (Implementation planning, deployment readiness, vendor project methodology), Req. 107–113 (Data migration), Req. 120–121 (Integrations), Req. 125 (Fully built, deployable solution)	UMS expects the implementation to be completed within a **mutually agreed upon timeframe** that reflects the vendor's solution of maturity, resource capacity, and implementation methodology. UMS requires a realistic, achievable schedule that supports thorough discovery, configuration, data migration, integrations, testing, training, and change management activities.**-upon timeframe**-management activities.
What is your preferred project completion date?	Req. 118–125 (Implementation planning, deployment readiness, vendor methodology), Req. 107–113 (Data migration), Req. 120–121 (Integrations), Req. 125 (Fully built, deployable solution)	UMS has internal planning targets; however, the preferred project completion date will ultimately be determined in coordination with the selected vendor. The final timeline depends on the maturity of the proposed solution, the vendor's implementation methodology, and the extent to which the solution is already fully built and deployable at contract award. UMS requires vendors to propose a realistic, achievable completion date that supports thorough discovery, configuration, data migration, integrations, testing, training, and change management activities.-management activities.

Vendor Question	Appendix H: Supporting Requirement(s)	UMS Answer
When is the project intended to be awarded, and what is the potential start date?	Req. 118–125 (Implementation planning, deployment readiness, vendor methodology), Req. 107–113 (Data migration), Req. 120–121 (Integrations), Req. 125 (Fully built, deployable solution)	UMS anticipates awarding the contract following completion of the evaluation and approval process outlined in the RFP. The intended project start date will align closely with contract execution and is expected to occur shortly after award. The exact award and kickoff dates will be confirmed during the final stages of procurement, but UMS expects vendors to be prepared to begin discovery and implementation activities promptly upon contract signing.
Can you outline the vendor onboarding process and provide an estimated timeline for completion?	Req. 118–125 (Implementation planning, deployment readiness, vendor methodology), Req. 107–113 (Data migration), Req. 120–121 (Integrations), Req. 125 (Fully built, deployable solution)	UMS follows a structured vendor onboarding process that includes contract execution, security and compliance review, integration planning, environment provisioning, and coordination with UMS IT and functional stakeholders. While UMS maintains standard onboarding steps, the overall timeline is dependent on the maturity of the vendor solution, the availability of required documentation, and the vendor's implementation methodology. Upon contract award, UMS will work with the selected vendor to finalize a mutually agreed upon onboarding schedule. As noted in the RFP, the proposed solution must be fully built and deployable at the time of award; solutions requiring new development or future releases will not be considered. The vendor's ability to provide a complete, production ready solution will directly influence the duration of onboarding and the establishment of a realistic implementation timeline. -upon onboarding schedule. As noted in the RFP, the proposed solution must be fully built and deployable at the time of award; solutions requiring new development or future releases will not be considered. The vendor's ability to provide a complete, production-ready solution will directly influence the duration of onboarding and the establishment of a realistic implementation timeline.
Please indicate your preferred training approach, such as train the trainer, user-specific training, or any alternative models.-the-trainer, user-specific training, or any alternative models.	Req. 118–125 (Implementation & deployment), Req. 5, 14, 33 (Billing & chargeback), Req. 16–25, 51–60 (Work orders & PM), Req. 120–121 (Integrations), Req. 125 (Fully built, deployable solution)	UMS anticipates a **blended training approach** that includes both **train the trainer** and **role-based, user-specific instruction**. The final training model will be developed collaboratively with the selected vendor and will be informed by the maturity of the vendor's training materials, the structure of the proposed solution, and configuration decisions made during implementation. UMS expects the awarded vendor to provide **comprehensive, production ready training resources**—including documentation, guided instruction, sandbox or practice environments, and support materials—without reliance on future development or beta functionality. This blended approach ensures that UMS staff, power users, and end users are fully prepared to go live.**-the-trainer-based, user-specific instruction-ready training resources**-live.
What is your approach to User Acceptance Testing (UAT), and what is the expected duration?	Req. 118–125 (Implementation & deployment), Req. 16–25, 51–60 (Work orders & PM), Req. 62–65 (Utility & energy management), Req. 97–101 (Reporting & analytics), Req. 120–121 (Integrations), Req. 125 (Fully built, deployable solution)	UMS conducts User Acceptance Testing (UAT) to validate that the delivered solution meets functional requirements, supports intended business processes, and is ready for production use. UAT typically includes scenario-based testing, validation of configured workflows, review of integrations, and confirmation that role-based permissions and data outputs perform as expected. UMS will collaborate with the selected vendor to define UAT scope, test scripts, and success criteria based on the capabilities of the proposed solution. The duration of UAT will depend on the maturity and completeness of the vendor's solution at the time of implementation. Once a fully built, deployable solution is selected, UMS and the vendor will jointly establish a realistic UAT schedule that ensures adequate time for testing, issue resolution, and validation prior to go live.-based testing, validation of configured workflows, review of integrations, and confirmation that role-based permissions and data outputs perform as expected. UMS will collaborate with the selected vendor to define UAT scope, test scripts, and success

Vendor Question	Appendix H: Supporting Requirement(s)	UMS Answer
		criteria based on the capabilities of the proposed solution. The duration of UAT will depend on the maturity and completeness of the vendor's solution at the time of implementation. Once a fully built, deployable solution is selected, UMS and the vendor will jointly establish a realistic UAT schedule that ensures adequate time for testing, issue resolution, and validation prior to go-live.
What is your approach to training, and what is the expected duration of the training program?	Req. 118–125 (Implementation & deployment), Req. 5, 14, 33 (Billing & chargeback), Req. 16–25, 51–60 (Work orders & PM), Req. 62–65 (Utility & energy management), Req. 97–101 (Reporting & analytics), Req. 120–121 (Integrations), Req. 125 (Fully built, deployable solution)	UMS anticipates a **blended training approach** that includes both **train the trainer** and **role-based, user-specific instruction**. The final training model will be developed collaboratively with the selected vendor and will be informed by the maturity of the vendor's training materials, the structure of the proposed solution, and configuration decisions made during implementation. UMS expects the awarded vendor to provide **comprehensive, production ready training resources**—including documentation, guided instruction, sandbox or practice environments, and support materials—without reliance on future development or beta functionality. The duration of the training program will depend on the completeness of the vendor's solution at the time of deployment and the breadth of functional areas being implemented. Once a fully built, deployable solution is selected, UMS and the vendor will work together to establish a realistic training schedule that ensures staff, power users, and end users are fully prepared for go live.**-the-trainer-based, user-specific instruction-ready training resources**-live.
What is the expected duration for Hypercare after go-live?	Req. 118–125 (Implementation & deployment), Req. 16–25, 51–60 (Work orders & PM), Req. 62–65 (Utility & energy management), Req. 97–101 (Reporting & analytics), Req. 120–121 (Integrations), Req. 125 (Fully built, deployable solution)	UMS anticipates a defined Hypercare period following go live to ensure system stability, user support, and timely resolution of post deployment issues. The exact duration will be established collaboratively with the selected vendor and will depend on the maturity of the proposed solution, the completeness of required functionality at go live, and the vendor's standard postimplementation support model. As outlined in the RFP, UMS requires a fully built, deployable solution at contract award; therefore, Hypercare is expected to focus on adoption and stabilization rather than remediation of incomplete or newly developed features. Once a compliant solution is selected, UMS and the vendor will jointly determine an appropriate Hypercare timeline that supports a smooth transition to steady state operations. -live to ensure system stability, user support, and timely resolution of post-deployment issues. The exact duration will be established collaboratively with the selected vendor and will depend on the maturity of the proposed solution, the completeness of required functionality at go-live, and the vendor's standard post-implementation support model. As outlined in the RFP, UMS requires a fully built, deployable solution at contract award; therefore, Hypercare is expected to focus on adoption and stabilization rather than remediation of incomplete or newly developed features. Once a compliant solution is selected, UMS and the vendor will jointly determine an appropriate Hypercare timeline that supports a smooth transition to -state
What are the key success factors for this implementation?	Req. 118–125 (Implementation & deployment), Req. 107–113 (Data migration), Req. 120–121 (Integrations), Req. 5, 14, 33 (Billing & chargeback), Req. 16–25, 51–60 (Work orders & PM), Req. 62–65 (Utility & energy management), Req. 97–101 (Reporting & analytics), Req. 125 (Fully built, deployable solution)	Key success factors include: **a fully built, deployable solution at contract award** that meets all required functionality without reliance on future development; **a clear, well-structured implementation methodology** with defined roles, deliverables, and milestones; **robust integration capabilities** that support secure, reliable data exchange with UMS enterprise systems; **accurate and complete data migration** supported by vendor provided templates and validation processes; **effective collaboration** between UMS and the vendor throughout discovery, configuration, testing, and deployment; **comprehensive,**

Vendor Question	Appendix H: Supporting Requirement(s)	UMS Answer
		production ready training resources that support both train the trainer and role based instruction; **thorough User Acceptance Testing (UAT)** to validate workflows, integrations, and reporting; and **a defined Hypercare period** focused on stabilization and adoption rather than remediation of incomplete features. Together, these factors ensure a predictable, compliant, and successful implementation. **-structured implementation methodology**-provided templates and validation processes; **-ready training resources**-the-trainer and role-based instruction;
Is there a need for continued long-term application support post go live?-term application support post go-live?	Req. 118–125 (Implementation & deployment), Req. 5, 14, 33 (Billing & chargeback), Req. 16–25, 51–60 (Work orders & PM), Req. 62–65 (Utility & energy management), Req. 97–101 (Reporting & analytics), Req. 120–121 (Integrations), Req. 125 (Fully built, deployable solution)	Yes. UMS anticipates the need for continued long-term application support following go live to ensure system stability, security, and ongoing operational effectiveness. Longterm support includes routine maintenance, security updates, issue resolution, and assistance with configuration or workflow adjustments as business needs evolve. As outlined in the RFP, the solution must be fully built and deployable at contract award; therefore, long term support is not intended to compensate for incomplete features or future development. Instead, it ensures reliable performance, continuous improvement, and alignment with UMS's operational and compliance requirements over time. -term application support following go-live to ensure system stability, security, and ongoing operational effectiveness. Long-term support includes routine maintenance, security updates, issue resolution, and assistance with configuration or workflow adjustments as business needs evolve. As outlined in the RFP, the solution must be fully built and deployable at contract award; therefore, long-term support is not intended to compensate for incomplete features or future development. Instead, it ensures reliable performance, continuous improvement, and alignment with UMS's operational and compliance requirements over time.
Are there specific efficiency metrics or KPIs you are looking to improve?	Req. 5, 14, 33 (Billing & chargeback), Req. 16–25, 51–60 (Work orders & PM), Req. 34–43 (Asset & equipment), Req. 62–65 (Utility & energy management), Req. 97–101 (Reporting & analytics), Req. 118–125 (Implementation & deployment), Req. 125 (Fully built, deployable solution)	Yes. UMS has identified several operational and financial KPIs that the IWMS must support and improve. Key areas include: **work order efficiency** (cycle time, response time, preventive vs. reactive ratios), **asset performance** (downtime, lifecycle cost visibility, condition accuracy), **preventive maintenance compliance** (on time completion, forecasting accuracy), **inventory and materials management** (stockout reduction, usage accuracy, cost tracking), **utility and energy management** (consumption and cost trends, anomaly detection, chargeback accuracy), **customer service responsiveness** (request transparency and turnaround time), and **reporting/data quality** (accuracy, consistency, and ability to produce campus level and systemwide analytics). These KPIs align with UMS's goals of improving operational efficiency, data integrity, cost recovery, and long-term planning.-time completion, forecasting accuracy), -level and system-wide analytics). These KPIs align with UMS's goals of improving operational efficiency, data integrity, cost recovery, and long-term planning.
Where is the data currently maintained and in what format?	Req. 107–116 (Data migration), Req. 1, 28, 34–43 (Asset & equipment), Req. 16–25, 51–60 (Work orders & PM), Req. 109 (Space plans)	UMS data is currently maintained in a combination of systems and repositories, including the existing IWMS (AiM), campus-maintained spreadsheets, network drives, SharePoint sites, and departmental databases. Formats include structured database tables, Excel files, PDFs, Word documents, images, CAD files, and proprietary attachment formats within Aim. -maintained spreadsheets, network drives, SharePoint sites, and departmental databases. Formats include structured database tables, Excel files, PDFs, Word documents, images, CAD files, and proprietary attachment formats within

Vendor Question	Appendix H: Supporting Requirement(s)	UMS Answer
Can data be exported into Excel templates to migrate the data?	Req. 107–113 (Data migration), Req. 125 (Fully built, deployable solution)	Yes. UMS can export data from AiM and related systems into vendor provided Excel templates or other structured formats. Vendors must supply clear templates, field definitions, and data rules early in implementation to support accurate mapping and validation. -provided Excel templates or other structured formats. Vendors must supply clear templates, field definitions, and data rules early in implementation to support accurate mapping and validation.
Do you need support in exporting the data from the current source?	Req. 107–113 (Data migration)	UMS can extract data from AiM and other repositories; however, the vendor must provide guidance on required formats, field mapping, and validation rules. UMS does not require the vendor to perform the extraction itself but expects support throughout the migration process.
Do you have any data quality issues that need to be resolved before migration (e.g., duplicates, missing values, outdated information)?	Req. 107–113 (Data migration), Req. 125 (Fully built, deployable solution)	UMS anticipates some data quality cleanup, including duplicates, outdated records, and missing values. UMS will work with the selected vendor during discovery to identify required cleansing activities and ensure migrated data meets the vendor's import standards.
Are there multiple systems involved in this migration? If so, please list them.	Req. 107–116 (Data migration), Req. 120–121 (Integrations)	Yes. Primary sources include the current IWMS (AiM), campus-maintained spreadsheets, network drives, SharePoint repositories, and other departmental systems that store asset, work order, utility, and documentation data. Final system list will be confirmed during discovery. -maintained spreadsheets, network drives, SharePoint repositories, and other departmental systems that store
What is the estimated volume of data for each data type?	Req. 107–113 (Data migration)	UMS maintains substantial volumes of work order history, asset records, PM schedules, inventory data, utility files, and attachments. Exact record counts and table volumes will be validated during discovery once the vendor's data model and migration templates are provided.
How would you describe the current quality of the data in your source systems (e.g., complete, inconsistent, outdated)?	Req. 107–113 (Data migration)	Data quality varies by dataset. Core operational data—such as active assets, PM schedules, and current work orders—is generally reliable. Historical and legacy datasets may contain inconsistencies, outdated information, or incomplete fields. UMS will collaborate with the vendor to identify required cleansing prior to migration.
Do you expect data migration support for any historical or transactional data?-migration support for any historical or transactional data?	Req. 107–113 (Data migration), Req. 125 (Fully built, deployable solution)	Yes. UMS expects to migrate both active and historical datasets necessary for operations, reporting, compliance, and long-term planning. This includes historical work orders, PM history, asset lifecycle data, utility records, and related attachments. Vendors must support migration of all required datasets.-term planning. This includes historical work orders, PM history, asset lifecycle data, utility records, and related attachments. Vendors must support migration of all required datasets.
What is the form and format of existing asset data to be migrated into the new platform (work order information, photos, related data)?	Req. 1, 28, 34–43 (Asset & equipment), Req. 16–25, 51–60 (Work orders & PM), Req. 107–116 (Data migration)	Asset data exists in structured database tables within AiM, supplemented by Excel based datasets maintained by campuses. Related data includes work order history, PM schedules, condition assessments, photos, O&M documentation, and other attachments. File formats include PDFs, Word documents, Excel files, JPEG/PNG images, and CAD files. All required asset related data will be provided in the vendor's import format. -based datasets maintained by campuses. -related

Data Questions

Respondent Question(s)	Answer
What is the current volume of Work Orders managed in UMS's system?	Approximately 44,000 per year.
How many user licenses will UMS need across the different user types mentioned below? **Admin users:**	+/- 5 sys admin
How many user licenses will UMS need across the different user types mentioned below? **Maintenance users:**	+/- 300 regular users.
How many user licenses will UMS need across the different user types mentioned below? **Requestor Users:**	Equal to enrollment, faculty staff
How many user licenses will UMS need across the different user types mentioned below? **Vendor Users:**	We do not currently allow vendors to interface with our IWMS system.
What is the Total number of individuals currently using the AiM system, broken down by Named/Authorized users versus concurrent users?	+/- 200, estimate 50 active
Provide the number of users in the new system? **Number of Project Managers**	+/- 12
Provide the number of users in the new system? **Number of Work Technicians?**	230
Provide the number of users in the new system? **Number of Supervisors?**	52
Provide the number of users in the new system? **Number of Power Users?**	12
Provide the number of users in the new system? **Number of Inventory Managers?**	None
Provide the number of users in the new system? **Number of Space Managers/Planners?**	3 presently. No planners in terms of classroom scheduling.
Provide the number of users in the new system? **Number of Lease Admins?**	+/- 5 sys admin
Provide the number of users in the new system? **Number of other users?**	Potential access for contractors or view access for various department heads across UMS. No known number.
How many service providers do you have and how are detail currently maintained?	Unknown
What are your space utilization metrics?	Unknown
Approximately how many historical work order records need to be migrated?	That's a question for our Governance team. If we were to move over 5 years' worth, it would be about 220,000 work orders.
What is the % of reactive vs preventive maintenance work?	Most campuses are reactive. 70 reactive 30 corrective.
How many people will need the ability to create room/space reservations?	Not certain. We have no dedicated function for that in our current IWMS.
On average, how many work orders are created in AiM per year?	40,000
How many room panels do you utilize to facilitate room/space reservations?	Unknown
What is the estimated data volume for: **Locations**	The location hierarchy consists of 9 Regions, 89 Facilities, 1,274 Properties, and 32,930 Locations.
What is the estimated data volume for: **Assets**	The estimated asset data volume is 41,315 Assets.
What is the estimated data volume for: **People**	The estimated people data volume is 27,482 Employees.
What is the estimated data volume for: **Organizations**	The estimated organization data volume is 1,457 Organizations.
How many facilities will undergo FCA?	Unknown
What inspection frequency is expected?	Dependent on compliance requirements and equipment. Can range from bi-annual to weekly.

How many assessment templates are needed?	Unknown
How many move requests are expected annually?	800 move requests.
How many Facilities do you currently maintain?	705 facilities, including some out-buildings, sports fields etc.
How many years of historical work order data need to be migrated to the new system? Approximately how many work orders in total?	That's a question for our Governance team. If we were to move over 5 years' worth, it would be about 220,000 work orders.