



**REQUEST FOR INFORMATION  
No. JD173684I**

**CAPITAL PLANNING  
BUDGET AND PROJECT MANAGEMENT SYSTEM**

## I. SCHEDULE OF EVENTS

### SCHEDULE OF EVENTS:

Issue Date.....December 15th, 2014

Due Date and Time.....December 23<sup>rd</sup>, 2014 (3:00 pm, PT)

## II. ISSUING OFFICE AND CONTACT

### ISSUING OFFICE:

The Procurement, Contracts and Material Management (PCMM) department of Oregon State University (OSU) is the issuing office and is the sole point of contact for this Request for Information. All concerns or questions pertaining to this Request for Information should be appropriately addressed to the individual identified below:

### CONTACT PERSON:

Name: Joshua Dodson  
Title: Procurement Contracts Officer

Telephone: (541) 737-3572  
Fax: (541) 737-2160  
E-Mail: joshua.dodson@oregonstate.edu

Address: Oregon State University  
Procurement, Contracts and Materials Management (PCMM)  
644 SW 13th Avenue  
Corvallis, Oregon 97333

## III. INTRODUCTION

### INTRODUCTION:

This is a Request for Information (RFI), issued by Oregon State University (OSU) Procurement Contracts and Materials Management (PCMM). The purpose of this RFI is to solicit input from potential contractors for information pertaining to a Capital Planning Budget and Project Management System.

### BACKGROUND:

Capital Planning and Development has a large amount of project information for their capital projects which has data residing in several locations. Currently transactional information, such as invoices and construction contracts get entered into our current project management system as well as some high level project information. Budgeting details are stored in Excel databases maintained by project managers and presented to clients and stakeholders at monthly meetings.

## CHALLENGES:

Information is stored in many locations, therefore reporting that is needed across projects is manually aggregated, which is very time consuming, and is prone to errors.

The current project management system does not allow for multiple funding sources, causing problems for capital projects which draw from different sources

Overall workflow is not documented, and has many manual processes which could be streamlined or automated.

Project documents are stored in share drives, and it not accessible to all stakeholders, or are sent via email creating multiple copies with different revision chains.

## OREGON STATE UNIVERSITY:

Founded in 1868, Oregon State University is a comprehensive, research-extensive, public university located in Corvallis. OSU is a member of the Oregon University System and one of only two American universities to hold the Land Grant, Sea Grant, Space Grant and Sun Grant designations. OSU is also the only Oregon institution to hold the Carnegie Foundation's top ranking for research universities, a recognition of the depth and quality of OSU's graduate education and research programs.

Through its centers, institutes, Extension offices and Experiment Stations, OSU has a presence in almost every one of Oregon's 36 counties, including its main campus in Corvallis, the Hatfield Marine Sciences Center in Newport and OSU-Cascades Campus in Bend. OSU offers undergraduate, master's and doctoral degrees through 12 academic colleges enrolling more than 25,000 students from every county in Oregon, every state in the country and more than 90 nations.

## IV. REQUIREMENTS

We are looking for a solution that will centralize our capital project information, serve as a transactional system that streamlines processes, and allows for data to come in from its source.

Below is list a critical and preferred requirements.

- Integration capabilities with OSU's financial system (Banner) through ApacheTalend with the ability to load invoices.
- Ability to track multiple funding source capabilities
- Ability to work with Bluebeam Revu
- Ability to create line item splits across funding sources
- Ability for users to create budget templates that can be easily adapted per project
- Ability for users to create contract templates easily adapted per project

- Allow OSU full access to our data which could be retrieved programmatically on, at minimum, a daily basis (particularly for Cloud-based solutions)
- Ability to send email notifications of “pending actions” queue to users
- Ability to generate contracts / word document “mail merges”
- Ability to allocate funding sources based on line item category
- Ability to centrally manage documents, including revision management
- Fields and forms that are Customizable by local administrator (OSU staff)
- Ability to graphically display, update and process workflows such as for RFI's and Change Orders
- Ability to conduct SAML 2.0 authentication integration (via Shibboleth)
- Ability to predict and report cash flows
- Ability to “Email In” documents to specific project’s document repository
- Availability of training resources and end user documentation
- Documentation of best practices for system design and functionality
- Documented usability standards for the suggested system

<b>V. SUBMITTALS</b>
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Respondents are requested to submit the following:

- Submit your response electronically to [joshua.dodson@oregonstate.edu](mailto:joshua.dodson@oregonstate.edu);
- OSU would like to see the vendor’s possible solutions for the requirements listed above. Please provide whatever documentation you feel is necessary to meet this need.
- Marketing material or brochures of goods or services referenced in the narrative;
- Examples of work and materials from similar projects.

To be considered, responses to this RFI must be received no later than the due date and time indicated in the Schedule of Events. Responses must be sent to the contact person identified in Section II of this RFI.

Information gathered in this process could potentially be incorporated in an Invitation to Bid (ITB) or Request for Proposal (RFP). Any resulting RFP or ITB will be openly competitive and therefore responses should not be exclusive or restrict competition. This RFI does not obligate OSU to issue an RFP or ITB nor to include information submitted by respondents.

A contract will not be issued directly from this RFI, nor will issuance or acceptance of submittals or subsequent conversations bind OSU into any type of contractual obligation or relationship.