



MASTER AGREEMENT #102424
CATEGORY: Facility Assessment and Planning with Related Services
SUPPLIER: The Gordian Group, Inc.

This Master Agreement (Agreement) is between Sourcewell, a Minnesota service cooperative located at 202 12th Street Northeast, P.O. Box 219, Staples, MN 56479 (Sourcewell) and The Gordian Group, Inc., 30 Patewood Drive, Bldg. 2, Suite 350, Greenville, SC 29615 (Supplier).

Sourcewell is a local government and service cooperative created under the laws of the State of Minnesota (Minnesota Statutes Section 123A.21) offering a Cooperative Purchasing Program to eligible participating government entities.

Under this Master Agreement entered with Sourcewell, Supplier will provide Included Solutions to Participating Entities through Sourcewell's Cooperative Purchasing Program.

Article 1:
General Terms

The General Terms in this Article 1 control the operation of this Master Agreement between Sourcewell and Supplier and apply to all transactions entered by Supplier and Participating Entities. Subsequent Articles to this Master Agreement control the rights and obligations directly between Sourcewell and Supplier (Article 2), and between Supplier and Participating Entity (Article 3), respectively. These Article 1 General Terms control over any conflicting terms. Where this Master Agreement is silent on any subject, Participating Entity and Supplier retain the ability to negotiate mutually acceptable terms.

- 1) **Purpose.** Pursuant to Minnesota law, the Sourcewell Board of Directors has authorized a Cooperative Purchasing Program designed to provide Participating Entities with access to competitively awarded cooperative purchasing agreements. To facilitate the Program, Sourcewell has awarded Supplier this cooperative purchasing Master Agreement following a competitive procurement process intended to meet compliance standards in accordance with Minnesota law and the requirements contained herein.
- 2) **Intent.** The intent of this Master Agreement is to define the roles of Sourcewell, Supplier, and Participating Entity as it relates to Sourcewell's Cooperative Purchasing Program.
- 3) **Participating Entity Access.** Sourcewell's Cooperative Purchasing Program Master Agreements are available to eligible public agencies (Participating Entities). A Participating Entity's authority to access Sourcewell's Cooperative Purchasing Program is determined through the laws of its respective jurisdiction.
- 4) **Supplier Access.** The Included Solutions offered under this Agreement may be made available to any Participating Entity. Supplier understands that a Participating Entity's use of this Agreement is at the Participating Entity's sole convenience. Supplier will educate its sales and service forces about Sourcewell eligibility requirements and required documentation. Supplier will be responsible for ensuring sales are with Participating Entities.

- 5) **Term.** This Agreement is effective upon the date of the final signature below. The term of this Agreement is four (4) years from the effective date. The Agreement expires at 11:59 P.M. Central Time on January 3, 2029, unless it is cancelled or extended as defined in this Agreement.
- a) **Extensions.** Sourcewell and Supplier may agree to up to three (3) additional one-year extensions beyond the original four-year term. The total possible length of this Agreement will be seven (7) years from the effective date.
- b) **Exceptional Circumstances.** Sourcewell retains the right to consider additional extensions as required under exceptional circumstances.
- 6) **Survival of Terms.** Notwithstanding the termination of this Agreement, the obligations of this Agreement will continue through the performance period of any transaction entered between Supplier and any Participating Entity before the termination date.
- 7) **Scope.** Supplier is awarded a Master Agreement to provide the solutions identified in RFP #102424 to Participating Entities. In Scope solutions include:
- a) Facility and building condition assessment and auditing;
 - b) Energy, utility, and emissions assessment and planning;
 - c) Site, safety, and code inspections;
 - d) Space utilization and planning;
 - e) Geographic information system (GIS) services
 - f) Feasibility, sustainability, and lifecycle assessment;
 - g) Asset, capital, and deferred maintenance planning and asset classification;
 - h) Benchmarking services and quality assurance;
 - i) Project management and coordination with facility owners;
 - j) Contract management and financial monitoring; and
 - k) Budget development, and program management services.
- 8) **Included Solutions.** Supplier's Proposal to the above referenced RFP is incorporated into this Master Agreement. Only those Solutions included within Supplier's Proposal and within Scope (Included Solutions) are included within the Agreement and may be offered to Participating Entities.
- 9) **Indefinite Quantity.** This Master Agreement defines an indefinite quantity of sales to eligible Participating Entities.
- 10) **Pricing.** Pricing information (including Pricing and Delivery and Pricing Offered tables) for all Included Solutions within Supplier's Proposal is incorporated into this Master Agreement.
- 11) **Not to Exceed Pricing.** Suppliers may not exceed the prices listed in the current Pricing List on file with Sourcewell when offering Included Solutions to Participating Entities. Participating Entities may request adjustments to pricing directly from Supplier during the negotiation and execution of any transaction.
- 12) **Open Market.** Supplier's open market pricing process is included within its Proposal.

13) Supplier Representations:

- i) **Compliance.** Supplier represents and warrants it will provide all Included Solutions under this Agreement in full compliance with applicable federal, state, and local laws and regulations.
 - ii) **Licenses.** As applicable, Supplier will maintain a valid status on all required federal, state, and local licenses, bonds, and permits required for the operation of Supplier's business with Participating Entities. Participating Entities may request all relevant documentation directly from Supplier.
 - iii) **Supplier Warrants.** Supplier warrants that all Included Solutions furnished under this Agreement are free from liens and encumbrances, and are free from defects in design, materials, and workmanship. In addition, Supplier warrants the Solutions are suitable for and will perform in accordance with the ordinary use for which they are intended.
- 14) **Bankruptcy Notices.** Supplier certifies and warrants it is not currently in a bankruptcy proceeding. Supplier has disclosed all current and completed bankruptcy proceedings within the past seven years within its Proposal. Supplier must provide notice in writing to Sourcewell if it enters a bankruptcy proceeding at any time during the term of this Agreement.
- 15) **Debarment and Suspension.** Supplier certifies and warrants that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from programs operated by the State of Minnesota, the United States federal government, or any Participating Entity. Supplier certifies and warrants that neither it nor its principals have been convicted of a criminal offense related to the subject matter of this Agreement. Supplier further warrants that it will provide immediate written notice to Sourcewell if this certification changes at any time during the term of this Agreement.
- 16) **Provisions for non-United States federal entity procurements under United States federal awards or other awards (Appendix II to 2 C.F.R § 200).** Participating Entities that use United States federal grant or other federal funding to purchase solutions from this Agreement may be subject to additional requirements including the procurement standards of the Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards, 2 C.F.R. § 200. Participating Entities may have additional requirements based on specific funding source terms or conditions. Within this Section, all references to "federal" should be interpreted to mean the United States federal government. The following list applies when a Participating Entity accesses Supplier's Included Solutions with United States federal funds.
- i) **EQUAL EMPLOYMENT OPPORTUNITY.** Except as otherwise provided under 41 C.F.R. § 60, all agreements that meet the definition of "federally assisted construction contract" in 41 C.F.R. § 60-1.3 must include the equal opportunity clause provided under 41 C.F.R. § 60-1.4(b), in accordance with Executive Order 11246, "Equal Employment Opportunity" (30 FR 12319, 12935, 3 C.F.R. §, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, "Amending Executive Order 11246 Relating to Equal Employment Opportunity," and implementing regulations at 41 C.F.R. § 60, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor." The equal opportunity clause is incorporated herein by reference.

ii) **DAVIS-BACON ACT, AS AMENDED (40 U.S.C. § 3141-3148).** When required by federal program legislation, all prime construction contracts in excess of \$2,000 awarded by non-federal entities must include a provision for compliance with the Davis-Bacon Act (40 U.S.C. § 3141-3144, and 3146-3148) as supplemented by Department of Labor regulations (29 C.F.R. § 5, “Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction”). In accordance with the statute, contractors must be required to pay wages to laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor. In addition, contractors must be required to pay wages not less than once a week. The non-federal entity must place a copy of the current prevailing wage determination issued by the Department of Labor in each solicitation. The decision to award a contract or subcontract must be conditioned upon the acceptance of the wage determination. The non-federal entity must report all suspected or reported violations to the federal awarding agency. The contracts must also include a provision for compliance with the Copeland “Anti-Kickback” Act (40 U.S.C. § 3145), as supplemented by Department of Labor regulations (29 C.F.R. § 3, “Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States”). The Act provides that each contractor or subrecipient must be prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the compensation to which he or she is otherwise entitled. The non-federal entity must report all suspected or reported violations to the federal awarding agency. Supplier must comply with all applicable Davis-Bacon Act provisions.

iii) **CONTRACT WORK HOURS AND SAFETY STANDARDS ACT (40 U.S.C. § 3701-3708).** Where applicable, all contracts awarded by the non-federal entity in excess of \$100,000 that involve the employment of mechanics or laborers must include a provision for compliance with 40 U.S.C. §§ 3702 and 3704, as supplemented by Department of Labor regulations (29 C.F.R. § 5). Under 40 U.S.C. § 3702 of the Act, each contractor must be required to compute the wages of every mechanic and laborer on the basis of a standard work week of 40 hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the work week. The requirements of 40 U.S.C. § 3704 are applicable to construction work and provide that no laborer or mechanic must be required to work in surroundings or under working conditions which are unsanitary, hazardous or dangerous. These requirements do not apply to the purchases of supplies, materials, or articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence. This provision is hereby incorporated by reference into this Agreement. Supplier certifies that during the term of an award for all Agreements by Sourcewell resulting from this procurement process, Supplier must comply with applicable requirements as referenced above.

iv) **RIGHTS TO INVENTIONS MADE UNDER A CONTRACT OR AGREEMENT.** If the federal award meets the definition of “funding agreement” under 37 C.F.R. § 401.2(a) and the recipient or subrecipient wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that “funding agreement,” the recipient or subrecipient must comply with the requirements of 37 C.F.R. § 401, “Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements,” and any implementing regulations issued by the awarding agency. Supplier

certifies that during the term of an award for all Agreements by Sourcewell resulting from this procurement process, Supplier must comply with applicable requirements as referenced above.

v) **CLEAN AIR ACT (42 U.S.C. § 7401-7671Q.) AND THE FEDERAL WATER POLLUTION CONTROL ACT (33 U.S.C. § 1251-1387).** Contracts and subgrants of amounts in excess of \$150,000 require the non-federal award to agree to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. § 7401- 7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. § 1251- 1387). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA). Supplier certifies that during the term of this Agreement it will comply with applicable requirements as referenced above.

vi) **DEBARMENT AND SUSPENSION (EXECUTIVE ORDERS 12549 AND 12689).** A contract award (see 2 C.F.R. § 180.220) must not be made to parties listed on the government wide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 C.F.R. § 180 that implement Executive Orders 12549 (3 C.F.R. § 1986 Comp., p. 189) and 12689 (3 C.F.R. § 1989 Comp., p. 235), "Debarment and Suspension." SAM Exclusions contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549. Supplier certifies that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation by any federal department or agency.

vii) **BYRD ANTI-LOBBYING AMENDMENT, AS AMENDED (31 U.S.C. § 1352).** Suppliers must file any required certifications. Suppliers must not have used federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any federal contract, grant, or any other award covered by 31 U.S.C. § 1352. Suppliers must disclose any lobbying with non-federal funds that takes place in connection with obtaining any federal award. Such disclosures are forwarded from tier to tier up to the non-federal award. Suppliers must file all certifications and disclosures required by, and otherwise comply with, the Byrd Anti-Lobbying Amendment (31 U.S.C. § 1352).

viii) **RECORD RETENTION REQUIREMENTS.** To the extent applicable, Supplier must comply with the record retention requirements detailed in 2 C.F.R. § 200.333. The Supplier further certifies that it will retain all records as required by 2 C.F.R. § 200.333 for a period of 3 years after grantees or subgrantees submit final expenditure reports or quarterly or annual financial reports, as applicable, and all other pending matters are closed.

ix) **ENERGY POLICY AND CONSERVATION ACT COMPLIANCE.** To the extent applicable, Supplier must comply with the mandatory standards and policies relating to energy efficiency which are contained in the state energy conservation plan issued in compliance with the Energy Policy and Conservation Act.

x) **BUY AMERICAN PROVISIONS COMPLIANCE.** To the extent applicable, Supplier must comply with all applicable provisions of the Buy American Act. Purchases made in accordance with the Buy American Act must follow the applicable procurement rules calling for free and open competition.

- xi) **ACCESS TO RECORDS (2 C.F.R. § 200.336).** Supplier agrees that duly authorized representatives of a federal agency must have access to any books, documents, papers and records of Supplier that are directly pertinent to Supplier's discharge of its obligations under this Agreement for the purpose of making audits, examinations, excerpts, and transcriptions. The right also includes timely and reasonable access to Supplier's personnel for the purpose of interview and discussion relating to such documents.
- xii) **PROCUREMENT OF RECOVERED MATERIALS (2 C.F.R. § 200.322).** A non-federal entity that is a state agency or agency of a political subdivision of a state and its contractors must comply with Section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 C.F.R. § 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired during the preceding fiscal year exceeded \$10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.
- xiii) **FEDERAL SEAL(S), LOGOS, AND FLAGS.** The Supplier cannot use the seal(s), logos, crests, or reproductions of flags or likenesses of Federal agency officials without specific pre-approval.
- xiv) **NO OBLIGATION BY FEDERAL GOVERNMENT.** The U.S. federal government is not a party to this Agreement or any purchase by a Participating Entity and is not subject to any obligations or liabilities to the Participating Entity, Supplier, or any other party pertaining to any matter resulting from the Agreement or any purchase by an authorized user.
- xv) **PROGRAM FRAUD AND FALSE OR FRAUDULENT STATEMENTS OR RELATED ACTS.** The Contractor acknowledges that 31 U.S.C. § 38 (Administrative Remedies for False Claims and Statements) applies to the Supplier's actions pertaining to this Agreement or any purchase by a Participating Entity.
- xvi) **FEDERAL DEBT.** The Supplier certifies that it is non-delinquent in its repayment of any federal debt. Examples of relevant debt include delinquent payroll and other taxes, audit disallowance, and benefit overpayments.
- xvii) **CONFLICTS OF INTEREST.** The Supplier must notify the U.S. Office of General Services, Sourcewell, and Participating Entity as soon as possible if this Agreement or any aspect related to the anticipated work under this Agreement raises an actual or potential conflict of interest (as described in 2 C.F.R. Part 200). The Supplier must explain the actual or potential conflict in writing in sufficient detail so that the U.S. Office of General Services, Sourcewell, and Participating Entity are able to assess the actual or potential conflict; and provide any additional information as necessary or requested.
- xviii) **U.S. EXECUTIVE ORDER 13224.** The Supplier, and its subcontractors, must comply with U.S. Executive Order 13224 and U.S. Laws that prohibit transactions with and provision of resources and support to individuals and organizations associated with terrorism.

xix) **PROHIBITION ON CERTAIN TELECOMMUNICATIONS AND VIDEO SURVEILLANCE SERVICES OR EQUIPMENT.** To the extent applicable, Supplier certifies that during the term of this Agreement it will comply with applicable requirements of 2 C.F.R. § 200.216.

xx) **DOMESTIC PREFERENCES FOR PROCUREMENTS.** To the extent applicable, Supplier certifies that during the term of this Agreement, Supplier will comply with applicable requirements of 2 C.F.R. § 200.322.

Article 2: Sourcewell and Supplier Obligations

The Terms in this Article 2 relate specifically to Sourcewell and its administration of this Master Agreement with Supplier and Supplier's obligations thereunder.

- 1) **Authorized Sellers.** Supplier must provide Sourcewell a current means to validate or authenticate Supplier's authorized dealers, distributors, or resellers which may complete transactions of Included Solutions offered under this Agreement. Sourcewell may request updated information in its discretion, and Supplier agrees to provide requested information within a reasonable time.
- 2) **Product and Price Changes Requirements.** Supplier may request Included Solutions changes, additions, or deletions at any time. All requests must be made in writing by submitting a Sourcewell Price and Product Change Request Form to Sourcewell. At a minimum, the request must:
 - Identify the applicable Sourcewell Agreement number;
 - Clearly specify the requested change;
 - Provide sufficient detail to justify the requested change;
 - Individually list all Included Solutions affected by the requested change, along with the requested change (e.g., addition, deletion, price change); and
 - Include a complete restatement of Pricing List with the effective date of the modified pricing, or product addition or deletion. The new pricing restatement must include all Included Solutions offered, even for those items where pricing remains unchanged.

A fully executed Sourcewell Price and Product Change Request Form will become an amendment to this Agreement and will be incorporated by reference.

- 3) **Authorized Representative.** Supplier will assign an Authorized Representative to Sourcewell for this Agreement and must provide prompt notice to Sourcewell if that person is changed. The Authorized Representative will be responsible for:
 - Maintenance and management of this Agreement;
 - Timely response to all Sourcewell and Participating Entity inquiries; and
 - Participation in reviews with Sourcewell.

Sourcewell's Authorized Representative is its Chief Procurement Officer.

- 4) **Performance Reviews.** Supplier will perform a minimum of one review with Sourcewell per agreement year. The review will cover transactions to Participating Entities, pricing and terms, administrative fees, sales data reports, performance issues, supply chain issues, customer issues, and any other necessary information.

- 5) **Sales Reporting Required.** Supplier is required as a material element to this Master Agreement to report all completed transactions with Participating Entities utilizing this Agreement. Failure to provide complete and accurate reports as defined herein will be a material breach of the Agreement and Sourcewell reserves the right to pursue all remedies available at law including cancellation of this Agreement.
- 6) **Reporting Requirements.** Supplier must provide Sourcewell an activity report of all transactions completed utilizing this Agreement. Reports are due at least once each calendar quarter (Reporting Period). Reports must be received no later than 45 calendar days after the end of each calendar quarter. Supplier may report on a more frequent basis in its discretion. Reports must be provided regardless of the amount of completed transactions during that quarter (i.e., if there are no sales, Supplier must submit a report indicating no sales were made).

The Report must contain the following fields:

- Participating Entity Name (e.g., City of Staples Highway Department);
- Participating Entity Physical Street Address;
- Participating Entity City;
- Participating Entity State/Province;
- Participating Entity Zip/Postal Code;
- Sourcewell Participating Entity Account Number;
- Transaction Description;
- Transaction Purchased Price;
- Sourcewell Administrative Fee Applied; and
- Date Transaction was invoiced/sale was recognized as revenue by Supplier.

If collected by Supplier, the Report may include the following fields as available:

- Participating Entity Contact Name;
- Participating Entity Contact Email Address;
- Participating Entity Contact Telephone Number;

- 7) **Administrative Fee.** In consideration for the support and services provided by Sourcewell, Supplier will pay an Administrative Fee to Sourcewell on all completed transactions to Participating Entities utilizing this Agreement. Supplier will include its Administrative Fee within its proposed pricing. Supplier may not directly charge Participating Entities to offset the Administrative Fee.
- 8) **Fee Calculation.** Supplier's Administrative Fee payable to Sourcewell will be calculated as a stated percentage (listed in Supplier's Proposal) of all completed transactions utilizing this Master Agreement within the preceding Reporting Period. For certain categories, a flat fee may be proposed. The Administrative Fee will be stated in Supplier's Proposal.
- 9) **Fee Remittance.** Supplier will remit fee to Sourcewell no later than 45 calendar days after the close of the preceding calendar quarter in conjunction with Supplier's Reporting Period obligations defined herein. Payments should note the Supplier's name and Sourcewell-assigned Agreement number in the memo; and must be either mailed to Sourcewell above "Attn: Accounts Receivable" or remitted electronically to Sourcewell's banking institution per Sourcewell's Finance department instructions.

- 10) **Noncompliance.** Sourcewell reserves the right to seek all remedies available at law for unpaid or underpaid Administrative Fees due under this Agreement. Failure to remit payment, delinquent payments, underpayments, or other deviations from the requirements of this Agreement may be deemed a material breach and may result in cancellation of this Agreement and disbarment from future Agreements.
- 11) **Audit Requirements.** Pursuant to Minn. Stat. § 16C.05, subdivision 5, the books, records, documents, and accounting procedures and practices relevant to this Agreement are subject to examination by Sourcewell and the Minnesota State Auditor for a minimum of six years from the end of this Agreement. Supplier agrees to fully cooperate with Sourcewell in auditing transactions under this Agreement to ensure compliance with pricing terms, correct calculation and remittance of Administrative Fees, and verification of transactions as may be requested by a Participating Entity or Sourcewell.
- 12) **Assignment, Transfer, and Administrative Changes.** Supplier may not assign or otherwise transfer its rights or obligations under this Agreement without the prior written consent of Sourcewell. Such consent will not be unreasonably withheld. Sourcewell reserves the right to unilaterally assign all or portions of this Agreement within its sole discretion to address corporate restructurings, mergers, acquisitions, or other changes to the Responsible Party and named in the Agreement. Any prohibited assignment is invalid. Upon request Sourcewell may make administrative changes to agreement documentation such as name changes, address changes, and other non-material updates as determined within its sole discretion.
- 13) **Amendments.** Any material change to this Agreement must be executed in writing through an amendment and will not be effective until it has been duly executed by the parties.
- 14) **Waiver.** Failure by Sourcewell to enforce any right under this Agreement will not be deemed a waiver of such right in the event of the continuation or repetition of the circumstances giving rise to such right.
- 15) **Complete Agreement.** This Agreement represents the complete agreement between the parties for the scope as defined herein. Supplier and Sourcewell may enter into separate written agreements relating specifically to transactions outside of the scope of this Agreement.
- 16) **Relationship of Sourcewell and Supplier.** This Agreement does not create a partnership, joint venture, or any other relationship such as employee, independent contractor, master-servant, or principal-agent.
- 17) **Indemnification.** Supplier must indemnify, defend, save, and hold Sourcewell, including their agents and employees, harmless from any claims or causes of action, including attorneys' fees incurred by Sourcewell, arising out of any act or omission in the performance of this Agreement by the Supplier or its agents or employees; this indemnification includes injury or death to person(s) or property alleged to have been caused by some defect in design, condition, or performance of Included Solutions under this Agreement. Sourcewell's responsibility will be governed by the State of Minnesota's Tort Liability Act (Minnesota Statutes Chapter 466) and other applicable law.
- 18) **Data Practices.** Supplier and Sourcewell acknowledge Sourcewell is subject to the Minnesota Government Data Practices Act, Minnesota Statutes Chapter 13. As it applies to all data created and

maintained in performance of this Agreement, Supplier may be subject to the requirements of this chapter.

19) **Grant of License.**

a) **During the term of this Agreement:**

i) **Supplier Promotion.** Sourcewell grants to Supplier a royalty-free, worldwide, non-exclusive right and license to use the trademark(s) provided to Supplier by Sourcewell in advertising, promotional materials, and informational sites for the purpose of marketing Sourcewell's Agreement with Supplier.

ii) **Sourcewell Promotion.** Supplier grants to Sourcewell a royalty-free, worldwide, non-exclusive right and license to use Supplier's trademarks in advertising, promotional materials, and informational sites for the purpose of marketing Supplier's Agreement with Sourcewell.

b) **Limited Right of Sublicense.** The right and license granted herein includes a limited right of each party to grant sublicenses to their respective subsidiaries, distributors, dealers, resellers, marketing representatives, partners, or agents (collectively "Permitted Sublicensees") in advertising, promotional, or informational materials for the purpose of marketing the Parties' relationship. Any sublicense granted will be subject to the terms and conditions of this Article. Each party will be responsible for any breach of this section by any of their respective sublicensees.

c) **Use; Quality Control.**

i) Neither party may alter the other party's trademarks from the form provided and must comply with removal requests as to specific uses of its trademarks or logos.

ii) Each party agrees to use, and to cause its Permitted Sublicensees to use, the other party's trademarks only in good faith and in a dignified manner consistent with such party's use of the trademarks. Each party may make written notice to the other regarding misuse under this section. The offending party will have 30 days of the date of the written notice to cure the issue or the license/sublicense will be terminated.

d) **Termination.** Upon the termination of this Agreement for any reason, each party, including Permitted Sublicensees, will have 30 days to remove all Trademarks from signage, websites, and the like bearing the other party's name or logo (excepting Sourcewell's pre-printed catalog of suppliers which may be used until the next printing). Supplier must return all marketing and promotional materials, including signage, provided by Sourcewell, or dispose of it according to Sourcewell's written directions.

20) **Venue and Governing law between Sourcewell and Supplier Only.** The substantive and procedural laws of the State of Minnesota will govern this Agreement between Sourcewell and Supplier. Venue for all legal proceedings arising out of this Agreement between Sourcewell and Supplier will be in court of competent jurisdiction within the State of Minnesota. This section does not apply to any dispute between Supplier and Participating Entity. This Agreement reserves the right for Supplier and Participating Entity to negotiate this term to within any transaction documents.

- 21) **Severability.** If any provision of this Agreement is found by a court of competent jurisdiction to be illegal, unenforceable, or void then both parties will be relieved from all obligations arising from that provision. If the remainder of this Agreement is capable of being performed, it will not be affected by such determination or finding and must be fully performed.
- 22) **Insurance Coverage.** At its own expense, Supplier must maintain valid insurance policy(ies) during the performance of this Agreement with insurance company(ies) licensed or authorized to do business in the State of Minnesota having an "AM BEST" rating of A- or better, with coverage and limits of insurance not less than the following:
- a) **Commercial General Liability Insurance.** Supplier will maintain insurance covering its operations, with coverage on an occurrence basis, and must be subject to terms no less broad than the Insurance Services Office ("ISO") Commercial General Liability Form CG0001 (2001 or newer edition), or equivalent. At a minimum, coverage must include liability arising from premises, operations, bodily injury and property damage, independent contractors, products-completed operations including construction defect, contractual liability, blanket contractual liability, and personal injury and advertising injury. All required limits, terms and conditions of coverage must be maintained during the term of this Agreement.
 - \$1,500,000 each occurrence Bodily Injury and Property Damage
 - \$1,500,000 Personal and Advertising Injury
 - \$2,000,000 aggregate for products liability-completed operations
 - \$2,000,000 general aggregate
 - b) **Certificates of Insurance.** Prior to execution of this Agreement, Supplier must furnish to Sourcewell a certificate of insurance, as evidence of the insurance required under this Agreement. Prior to expiration of the policy(ies), renewal certificates must be mailed to Sourcewell, 202 12th Street Northeast, P.O. Box 219, Staples, MN 56479 or provided to in an alternative manner as directed by Sourcewell. The certificates must be signed by a person authorized by the insurer(s) to bind coverage on their behalf. Failure of Supplier to maintain the required insurance and documentation may constitute a material breach.
 - c) **Additional Insured Endorsement and Primary and Non-contributory Insurance Clause.** Supplier agrees to list Sourcewell, including its officers, agents, and employees, as an additional insured under the Supplier's commercial general liability insurance policy with respect to liability arising out of activities, "operations," or "work" performed by or on behalf of Supplier, and products and completed operations of Supplier. The policy provision(s) or endorsement(s) must further provide that coverage is primary and not excess over or contributory with any other valid, applicable, and collectible insurance or self-insurance in force for the additional insureds.
 - d) **Waiver of Subrogation.** Supplier waives and must require (by endorsement or otherwise) all its insurers to waive subrogation rights against Sourcewell and other additional insureds for losses paid under the insurance policies required by this Agreement or other insurance applicable to the Supplier or its subcontractors. The waiver must apply to all deductibles and/or self-insured retentions applicable to the required or any other insurance maintained by the Supplier or its subcontractors. Where permitted by law, Supplier must require similar written express waivers of subrogation and insurance clauses from each of its subcontractors.

- e) **Umbrella/Excess Liability/SELF-INSURED RETENTION.** The limits required by this Agreement can be met by either providing a primary policy or in combination with umbrella/excess liability policy(ies), or self-insured retention.
- 23) **Termination for Convenience.** Sourcewell or Supplier may terminate this Agreement upon 60 calendar days' written notice to the other Party. Termination pursuant to this section will not relieve the Supplier's obligations under this Agreement for any transactions entered with Participating Entities through the date of termination, including reporting and payment of applicable Administrative Fees.
- 24) **Termination for Cause.** Sourcewell may terminate this Agreement upon providing written notice of material breach to Supplier. Notice must describe the breach in reasonable detail and state the intent to terminate the Agreement. Upon receipt of Notice, the Supplier will have 30 calendar days in which it must cure the breach. Termination pursuant to this section will not relieve the Supplier's obligations under this Agreement for any transactions entered with Participating Entities through the date of termination, including reporting and payment of applicable Administrative Fees.

Article 3: Supplier Obligations to Participating Entities

The Terms in this Article 3 relate specifically to Supplier and a Participating Entity when entering transactions utilizing the General Terms established in this Master Agreement. Article 1 General Terms control over any conflict with this Article 3. Where this Master Agreement is silent on any subject, Participating Entity and Supplier retain the ability to negotiate mutually acceptable terms.

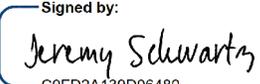
- 1) **Quotes to Participating Entities.** Suppliers are encouraged to provide all pricing information regarding the total cost of acquisition when quoting to a Participating Entity. Suppliers and Participating Entities are encouraged to include all cost specifically associated with or included within the Suppliers proposal and Included Solutions within transaction documents.
- 2) **Shipping, Delivery, Acceptance, Rejection, and Warranty.** Supplier's proposal may include proposed terms relating to shipping, delivery, inspection, and acceptance/rejection and other relevant terms of tendered Solutions. Supplier and Participating Entity may negotiate final terms appropriate for the specific transaction relating to non-appropriation, shipping, delivery, inspection, acceptance/rejection of tendered Solutions, and warranty coverage for Included Solutions. Such terms may include, but are not limited to, costs, risk of loss, proper packaging, inspection rights and timelines, acceptance or rejection procedures, and remedies as mutually agreed include notice requirements, replacement, return or exchange procedures, and associated costs.
- 3) **Applicable Taxes.** Participating Entity is responsible for notifying supplier of its tax-exempt status and for providing Supplier with any valid tax-exemption certification(s) or related documentation.
- 4) **Ordering Process and Payment.** Supplier's ordering process and acceptable forms of payment are included within its Proposal. Participating Entities will be solely responsible for payment to Supplier and Sourcewell will have no liability for any unpaid invoice of any Participating Entity.
- 5) **Transaction Documents.** Participating Entity may require the use of its own forms to complete transactions directly with Supplier utilizing the terms established in this Agreement. Supplier's

standard form agreements may be offered as part of its Proposal. Supplier and Participating Entity may complete and document transactions utilizing any type of transaction documents as mutually agreed. In any transaction document entered utilizing this Agreement, Supplier and Participating Entity must include specific reference to this Master Agreement by number and to Participating Entity's unique Sourcewell account number.

- 6) **Additional Terms and Conditions Permitted.** Participating Entity and Supplier may negotiate and include additional terms and conditions within transaction documentation as mutually agreed. Such terms may supplant or supersede this Master Agreement when necessary and as solely determined by Participating Entity. Sourcewell has expressly reserved the right for Supplier and Participating Entity to address any necessary provisions within transaction documents not expressly included within this Master Agreement, including but not limited to transaction cancellation, dispute resolution, governing law and venue, non-appropriation, insurance, defense and indemnity, force majeure, and other material terms as mutually agreed.
- 7) **Subsequent Agreements and Survival.** Supplier and Participating Entity may enter into a separate agreement to facilitate long-term performance obligations utilizing the terms of this Master Agreement as mutually agreed. Such agreements may provide for a performance period extending beyond the full term of this Master Agreement as determined in the discretion of Participating Entity.
- 8) **Participating Addendums.** Supplier and Participating Entity may enter a Participating Addendum or similar document extending and supplementing the terms of this Master Agreement to facilitate adoption as may be required by a Participating Entity.

Sourcewell

The Gordian Group, Inc.

Signed by:

 C0FD2A139D06489...
 By: _____
 Jeremy Schwartz
 Title: Chief Procurement Officer
 Date: 2/27/2025 | 12:26 PM CST

Signed by:

 12DBAF0CE2B4409...
 Matthew Bausher
 By: _____
 Title: Chief Customer Office
 Date: 01/29/2025 | 10:36 AM EST

RFP 102424 - Facility Assessment and Planning

Vendor Details

Company Name: The Gordian Group
Does your company conduct business under any other name? If yes, please state: Gordian
Address: 30 Patewood Drive
Building 2, Suite 350
Greenville, South Carolina 29615
Contact: Gabby Rosas
Email: g.rosas@gordian.com
Phone: 215-287-8226
Fax: 864-223-9100
HST#: 58-1900371

Submission Details

Created On: Friday September 06, 2024 11:07:37
Submitted On: Wednesday October 23, 2024 16:09:26
Submitted By: Gabby Rosas
Email: g.rosas@gordian.com
Transaction #: 677e6f69-420b-4ff9-b70a-70b622b4cf79
Submitter's IP Address: 136.226.55.88

Specifications

Table 1: Proposer Identity & Authorized Representatives (Not Scored)

General Instructions (applies to all Tables) Sourcewell prefers a brief but thorough response to each question. Do not merely attach additional documents to your response without also providing a substantive response. Do not leave answers blank; respond “N/A” if the question does not apply to you (preferably with an explanation).

Table 1 Specific Instructions. Sourcewell requires identification of all parties responsible for providing Solutions under a resulting master agreement(s) (Responsible Supplier). Proposers are strongly encouraged to include all potential Responsible Suppliers including any corporate affiliates, subsidiaries, D.B.A., and any other authorized entities within a singular proposal. All information required under this RFP must be included for each Responsible Supplier as instructed. Proposers with multiple Responsible Supplier options may choose to respond individually as distinct entities, however each response will be evaluated individually and only those proposals recommended for award may result in a master agreement award. Unawarded entities will not be permitted to later be added to an existing master agreement through operation of Proposer’s corporate organization affiliation.

Line Item	Question	Response *
1	Provide the legal name of the Proposer authorized to submit this Proposal.	The Gordian Group, Inc.
2	In the event of award, is this entity the Responsible Supplier that will execute the master agreement with Sourcewell? Y or N.	Yes
3	Identify all subsidiaries, D.B.A., authorized affiliates, and any other entity that will be responsible for offering and performing delivery of Solutions within this Proposal (i.e. Responsible Supplier(s) that will execute a master agreement with Sourcewell).	Gordian has the following subsidiaries: R.S. Means Company, LLC; Sightlines, LLC; VFA, Inc.; and 4Clicks, LLC
4	Provide your CAGE code or Unique Entity Identifier (SAM):	Cage Code: 0ZKV8 SAM: UEID#: R8JXSHBYMJS2
5	Provide your NAICS code applicable to Solutions proposed.	541690 Other Scientific and Technical Consulting Services
6	Proposer Physical Address:	30 Patewood Drive, Building 2, #350, Greenville, SC 29615
7	Proposer website address (or addresses):	https://www.gordian.com
8	Proposer’s Authorized Representative (name, title, address, email address & phone) (The representative must have authority to sign the “Proposer’s Assurance of Compliance” on behalf of the Proposer):	Ammon Leshar, Chief Operating Officer 30 Patewood Drive, Bldg. 2, Suite 350 Greenville, SC 29615 a.lesher@gordian.com 864.752.4545 Direct 864-395-8054 Mobile 800.874.2291 Toll-Free
9	Proposer’s primary contact for this proposal (name, title, address, email address & phone):	Ammon Leshar, Chief Operating Officer 30 Patewood Drive, Bldg. 2, Suite 350 Greenville, SC 29615 a.lesher@gordian.com 864.752.4545 Direct 864-395-8054 Mobile 800.874.2291 Toll-Free
10	Proposer’s other contacts for this proposal, if any (name, title, address, email address & phone):	Matthew Peterson Director, Co-Op Contracts 30 Patewood Drive, Bldg. 2, Suite 350 Greenville, SC 29615 M.Peterson@gordian.com 864.734.6323 Direct 218.851.9913 Mobile 800.874.2291 Toll-Free

Table 2A: Financial Viability and Marketplace Success (50 Points)

Line Item	Question	Response *
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11	Provide a brief history of your company, including your company's core values, business philosophy, and industry longevity related to the requested Solutions.	<p>Founded in 1990, The Gordian Group (Gordian) has been at the forefront of providing essential services for creating safe, functional, and resilient community spaces for over 30 years. Our core values and business philosophy are rooted in delivering impactful results through comprehensive solutions that ensure our customers can effectively budget, build, and maintain vital facilities and infrastructure. Initially specializing in Job Order Contracting Services, Gordian has continuously evolved, notably with the acquisition of R.S. Means Company, LLC in 2014, enhancing our construction cost data and software offerings. The acquisitions of Sightlines, LLC in 2015 and VFA, Inc. in 2021, further diversified our services to include Facility Condition Assessments, capital planning, and sustainability solutions. With over a quarter-century of expertise and a best-in-class platform, Gordian is recognized as an industry leader, providing data and service solutions for complex projects. Our commitment to clarity and actionable insights is embodied in our capital planning software—the Gordian Cloud Platform—which empowers stakeholders to make informed decisions. We pride ourselves on a culture of continuous improvement, ensuring our offerings remain at the pinnacle of quality for our customers and Sourcewell Members.</p> <p>Gordian has additional longevity and stability as a subsidiary of Fortive (NYSE: FTV), a \$6.1 billion Fortune 500 company; see the response to question 13 for more information.</p>	*
12	What are your company's expectations in the event of an award?	Upon receiving an award, Sourcewell Members can immediately utilize the contract to procure Gordian Assessment and Capital Planning (ACP) services. Additionally, for any inquiries regarding Sourcewell, we will continue to have a dedicated Sourcewell representative available to provide support and answer questions.	*
13	Demonstrate your financial strength and stability with meaningful data. This could include such items as financial statements, SEC filings, credit and bond ratings, letters of credit, and detailed reference letters. Upload supporting documents (as applicable) in the document upload section of your response. DO NOT PROVIDE ANY TAX INFORMATION OR PERSONALLY IDENTIFIABLE INFORMATION.	<p>Gordian is a subsidiary of Fortive (NYSE: FTV), a \$6.1 billion Fortune 500 company that has strong financial stability. Financial information is publicly available at Fortive.com under Investors > Reports and Filings, or at the following link: https://investors.fortive.com/financial-reports-filings/annual-reports-and-proxy-statements/default.aspx</p> <p>As a public entity, we can only report financials that are published under the Annual 10-K Report of the parent company, Fortive Corporation. Gordian financials are rolled up into the 'Intelligent Operating Solutions' business segment in the 10-K Report.</p>	*
14	What is your US market share for the Solutions that you are proposing?	Gordian currently has 352 customers in the US, which represents 6.2% of our total addressable market.	*
15	What is your Canadian market share for the Solutions that you are proposing?	Gordian currently has 118 customers in Canada, which represents 11.9% of our total addressable market.	*
16	Disclose all current and completed bankruptcy proceedings for Proposer and any included possible Responsible Party within the past seven years. Proposer must provide notice in writing to Sourcewell if it enters a bankruptcy proceeding at any time during the pendency of this RFP evaluation.	Gordian has no current or completed bankruptcy proceedings against our organization within the past seven years. If Gordian enters a bankruptcy proceeding at any time during the pendency of the evaluation of RFP #102424, we will provide written notice to Sourcewell.	*
17	<p>How is your organization best described: is it a manufacturer, a distributor/dealer/reseller, or a service provider? Answer the question that best applies to your organization, either a) or b).</p> <p>a) If your company is best described as a distributor/dealer/reseller (or similar entity), provide your written authorization to act as a distributor/dealer/reseller for the manufacturer of the products proposed in this RFP. If applicable, is your dealer network independent or company owned?</p> <p>b) If your company is best described as a manufacturer or service provider, describe your relationship with your sales and service force and with your dealer network in delivering the products and services proposed in this RFP. Are these individuals your employees, or the employees of a third party?</p>	<p>a) Not applicable</p> <p>b) Gordian is best described as a manufacturer and service provider that offers some services utilizing resellers such as RSMMeans. Gordian utilizes internal full-time sales staff to sell and deliver the facility assessment and planning products and services proposed.</p>	*
18	If applicable, provide a detailed explanation outlining the licenses and certifications that are both required to be held, and actually held, by your organization (including third parties and subcontractors that you use) in pursuit of the business contemplated by this RFP.	Not applicable	*

19	Disclose all current and past debarments or suspensions for Proposer and any included possible Responsible Party within the past seven years. Proposer must provide notice in writing to Sourcewell if it enters a debarment or suspension status any time during the pendency of this RFP evaluation.	Gordian, its principals, and its staff have not been debarred, suspended, or otherwise prohibited from conducting business with any Federal, State, or local agency within the past seven years or any time in its history. If Gordian enters debarment or suspension status at any time during the pendency of the evaluation of RFP #102424, we will provide written notice to Sourcewell.	*
20	Describe any relevant industry awards or recognition that your company has received in the past five years.	<p>In the past five years, Gordian has been recognized with the following awards and recognition:</p> <ul style="list-style-type: none"> • 2024 SIIA CODiE Award Winner, Best AI-Driven Technology Solution. Gordian was named as the provider of the best AI-driven business technology solution for 2024 as part of the annual Software & Information Industry Association (SIIA) CODiE Awards. • 2024, SIIA CODiE Award Finalist, Best Construction Management Platform. In addition to our win for Best AI-Driven Technology Solution, Gordian was also a 2024 CODiE Award finalist in the Best Construction Management Platform category for our robust Gordian Cloud Platform. • 2024, Energage Top Workplaces USA Award Winner. Gordian earned the 2024 Top Workplaces USA award, issued by Energage, a purpose-driven organization that develops solutions to build and brand Top Workplaces. The Top Workplaces program has a 15-year history of surveying more than 20 million employees and recognizing the top organizations across 60 markets for regional Top Workplaces awards. • 2024, Fortive's Impact Innovation Award. Gordian was the 2024 Impact Gold Medal Winner for our Assessment and Capital Planning (ACP) Solution. Our new ACP solution modernizes facility management by integrating mobile asset capture, intelligent data management, and capital planning insights on the Gordian Cloud Platform, delivering our customers streamlined workflows for efficient capital planning and asset management. The Impact Innovation Awards recognize innovations that have driven strong commercial results in the market. • 2024, Fortive's Disruptor Innovation Award. Out of 33 total submissions across Fortive OpCos, Gordian was one of the five winners for our new AI Tools Suite, which includes the Scope of Work Generator and the Image Recognition Tool (TagStarr). These products, the first AI-enabled, externally facing solutions from Gordian, leverage advanced technology to streamline on-site workflows by automating scope of work creation and asset capture, enhancing accuracy, efficiency, and data reliability. The Disruptor Innovation Awards recognize early-stage innovations that have strong evidence of customer adoption and market potential but may not have yet reached their full potential. • 2019, USPS Supplier Performance Award. The United States Postal Service (USPS) recognized Gordian with its 2016 and 2019 Supplier Performance Award for superior supply chain management efforts through Job Order Contracting, allowing the Postal Service to more effectively provide exceptional mail service to the American public. 	*
21	What percentage of your sales are to the governmental sector in the past three years?	Gordian's average government sector sales for the last three years exceeds 80% annually.	*
22	What percentage of your sales are to the education sector in the past three years?	Gordian's percentage of sales to the education sector is approximately 30%. This percentage is included in the 80% of sales to the government sector since many are K-12 and other public education facilities.	*
23	List all state, cooperative purchasing agreements that you hold. What is the annual sales volume for each of these agreement over the past three years?	<p>Gordian holds cooperative purchasing agreements with the following agencies:</p> <ul style="list-style-type: none"> • Buy Boards • Capital Region Council of Governments (CRCOG) • Education Services Commission of New Jersey (ESCNJ) • Keystone Purchasing Network • Omnia Partners • The Equalis Group • Kinetic GPO • Canoe Procurement Group of Canada • Cooperative Educational Services New Mexico • PACE Purchasing Cooperative • State of Utah • State of Maryland • State of Arizona • State of Virginia <p>Gordian upholds confidentiality and provides the annual sales volume over the past three years for each agreement in our non-public-facing deliverables.</p>	*

24	List any GSA contracts or Standing Offers and Supply Arrangements (SOSA) that you hold. What is the annual sales volume for each of these contracts over the past three years?	Gordian does not hold any GSA contracts or SOSAs related to the services offered in this proposal.	*
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Table 2B: References/Testimonials

Line Item 25. Supply reference information from three customers who are eligible to be Sourcwell participating entities.

Entity Name *	Contact Name *	Phone Number *	
University of Maryland, Baltimore	Jim Bolton	(410) 706-6082	*
City of Modesto, CA	Patrick Crowley	(209) 342-2274	*
Texas A&M Corpus Christi	Scott Meares	(361) 825-2107	*

Table 3: Ability to Sell and Deliver Solutions (150 Points)

Describe your company's capability to meet the needs of Sourcwell participating entities across the US and Canada, as applicable. Your response should address in detail at least the following areas: locations of your network of sales and service providers, the number of workers (full-time equivalents) involved in each sector, whether these workers are your direct employees (or employees of a third party), and any overlap between the sales and service functions.

Line Item	Question	Response *	
26	Sales force.	Within its total staff count of 1,000+ employees, Gordian has more than 110 employees throughout its sales force across the United States.	*
27	Describe the network of Authorized Sellers who will deliver Solutions, including dealers, distributors, resellers, and other distribution methods.	Not applicable for facility assessment and planning services and products.	*
28	Service force.	Within a total staff count of 1,000+ employees, Gordian's Operations team is comprised of over 200 facilities professionals throughout North America who provide services to each of our customers. Gordian's human resources provide access to hundreds of planning, design, procurement, construction, and operations experts who collaborate on projects as needed.	*
29	Describe the ordering process. If orders will be handled by distributors, dealers or others, explain the respective roles of the Proposer and others.	<p>The order process consists of a contract or purchase order from the Sourcwell Member, usually resulting from a Statement of Work (SOW) document developed by Gordian based on Member requirements. When the Member approves the SOW, a purchase order can be issued, and the project can be scheduled and executed.</p> <p>As a current Sourcwell partner, Gordian will continue to report and pay administrative fees on sales from this contract as currently performed.</p> <p>Gordian handles all orders directly.</p>	*

<p>30</p>	<p>Describe in detail the process and procedure of your customer service program, if applicable. Include your response-time capabilities and commitments, as well as any incentives that help your providers meet your stated service goals or promises.</p>	<p>Gordian is committed to providing the necessary support and collaboration for the successful implementation of the Gordian Cloud Platform (GCP) and Mobile Asset Capture tools, crucial for managing customer's capital planning objectives. The following resources are available to customers:</p> <ul style="list-style-type: none"> • Resource Center. Customers benefit from: <ul style="list-style-type: none"> On-demand how-to videos Regular product updates Training and seminars An extensive online help guide • Customer Success Manager. Each customer is paired with a Customer Success Manager to: <ul style="list-style-type: none"> Offer tailored support throughout their GCP subscription Align with Customers' goals for operational success and informed decision-making • Customer Support. For any GCP-related inquiries, customers can contact: <ul style="list-style-type: none"> Email: gordiansupport@gordian.com Phone: 800.448.8182 Support hours are Monday through Friday, 8 AM to 8 PM (EST), except for Holidays <p>Our support infrastructure is designed to empower customers with the tools and guidance needed to efficiently achieve their capital planning objectives.</p> <p>Gordian has an established Service Level Agreement (SLA) Policy, which includes the following capabilities and commitments, listed in order of Severity Level:</p> <ul style="list-style-type: none"> • Severity Level 1. A critical incident that results in a complete system outage or major application failures and prevents the customer from performing critical business functions that have immediate impacts on finance or data integrity. There is no workaround available. <ul style="list-style-type: none"> Target Response Time During "Business Hours"– 1 hour • Severity Level 2. A serious incident that prevents the execution of a critical business function, disrupts a major business function, and causes a serious impact on daily functions or processing There is no acceptable workaround available. <ul style="list-style-type: none"> Target Response Time During "Business Hours"– 4 hours • Severity Level 3. An incident that does not prevent the execution of a critical business function and does not impact data integrity. The problem may be reasonably circumvented using an available workaround. <ul style="list-style-type: none"> Target Response Time During "Business Hours"– 2 business days • Severity Level 4. An inquiry and/or low-impact process issue. Examples include cosmetic defects on screens, errors in documentation, or an enhancement request. <ul style="list-style-type: none"> Target Response Time During "Business Hours"– 3 business days <p>A single miss of a target SLA that occurs for two (2) consecutive months grants the customer three service credits. Service credits shall mean the average daily subscription fee, calculated by dividing the annual subscription.</p>
<p>31</p>	<p>Describe your process for data collection, review, and analysis.</p>	<p>During the Data Development Phase of the FCA, Gordian will process and refine the data collected on-site, ensuring that each facility's profile is accurately documented, costed, and analyzed for effective lifecycle management on the Gordian Cloud Platform.</p> <p>Data Collection</p> <p>The Gordian Project Manager communicates with the customer's facility and maintenance managers via email and teleconferencing to gather essential information for our assessment teams. This data includes asset details like floor plans, drawings, and recent capital improvements. Gordian uses SharePoint to host an information repository crucial for the project's progress.</p> <p>Gordian's Mobile Asset Capture application allows users to digitally record facility assets on-site, capturing photos and asset details with a user-friendly interface. This data is integrated with RSMeans Data and stored in the Gordian Cloud Platform, organized by Uniformat code. The ASTM International Uniformat II Classification provides a standard reference for building elements, aiding in the consistent management of building components throughout their life cycles.</p> <p>Data Review and Analysis</p> <p>Gordian processes and refines the data collected on-site, ensuring that each facility's profile is accurately documented, costed, and analyzed for effective lifecycle management on the Gordian Cloud Platform.</p>

Data Processing

After the on-site work is complete and the data has been synced to the Gordian Cloud Platform, the Gordian assessment team(s) reviews their notes and findings and complete the tasks of documenting each facility, including asset and/or requirement data updates, costing, estimated life, and reporting. All data is housed on the Gordian Cloud Platform.

Some organizations have experienced staff that are very knowledgeable about the facilities they manage. We are happy to collaborate with these professionals to help uncover issues that may not be immediately evident. When your staff has the capability and bandwidth to participate, our Gordian team can conduct interviews with your facilities personnel to capture their expert knowledge, ensuring that all known issues are accounted for and clarifying initial observations. These discussions help align with operational goals and establish accurate repair priorities and timelines. Engaging your team in this way aids in creating a comprehensive list of facility needs and fosters ownership and buy-in across your organization.

Facilities are broken down into their assets, and each facility may contain one or more assets. These assets are cataloged to provide a current inventory of what is inside the facility at the time of the assessment—for example, the type and quantity of roofing or ceiling materials (e.g., how much acoustical ceiling tile vs. gypsum wallboard ceilings).

For each asset, we determine two key pieces of information:

- Expected Useful Life. This is an estimation of how long an asset should last under normal conditions, based on industry standards and manufacturer guidelines (e.g., how long should this roof last?).
- Remaining Useful Life. Based on the visual inspection, we assess how much longer the asset can continue to function effectively (e.g., how long can we expect the roof to last?).

Next, Gordian determines the:

- Asset Replacement Cost. The cost of replacing an asset with current equivalent technology is determined using RSMeans data, which provides up-to-date pricing on materials and labor. RSMeans, a Gordian product, is a fundamental source of accurate cost data, and our planning team and tools have unique access to all RSMeans data and engineers. All cost estimates are developed using RSMeans Construction and Facilities Maintenance and Repair Costs data, embedded in the Gordian Cloud Platform software. Gordian maintains an extensive construction cost-estimating library that includes renovation, repair, systems renewals, upgrades, and construction packages, as well as building replacement values from the RSMeans data source. This ensures consistent and reliable construction cost estimates for capital planning. Our cost data is updated annually to reflect changes in raw materials, supply and demand, shipping costs, market maturity, time of year, energy costs, and industry trends. Additionally, RSMeans data is regionally adjusted using location factors across North America.
- Facility Replacement Value. We calculate replacement values using our Gordian Cloud Platform software and apply a \$/GSF cost estimate made up of a variety of different variables, including:
 - The size of the facility in Gross Square Feet (GSF)
 - Technical complexity of the facility according to the Gordian tech rating scale
 - Regional construction cost indexes
 - Function of the facility
- For the FCA+ Service: Requirement Cost. The estimated remedial action cost. Requirements are material deficiencies (e.g. unsafe, broken/damaged, can no longer perform the intended function, does not conform to current codes, or maybe an improvement to the facility, such as an energy conservation project). The survey includes capital needs rather than operational, such as major repairs to the air handling unit vs. changing a fan belt. Capital vs. operational expenses are set by a dollar minimum threshold—we set this amount at \$3,000. The threshold is agreed upon at the beginning of the project. Life Safety deficiencies, if determined, are identified regardless of the dollar threshold amount. Deficiencies that may be remedied with routine maintenance, minor repair, or normal operating maintenance are excluded unless it is found to be systemic across the entire facility.

Requirements are identified for the entire facility—not by individual room or component unless specified otherwise.

Testing, measuring, or preparing calculations for any asset or component to determine adequacy, capacity, or compliance with any standard is outside the scope of assessment.

		<p>Facilities and Asset Descriptions (FCA+ Service)</p> <p>A narrative summary of each assessed facility and its assets is documented to support field findings and adjustments. This information is useful for having key information about a facility including finishes and infrastructure. For all assets—where the condition is rated poor—and all requirements, a narrative describes the needs in detail.</p> <p>Data Quality Control and Assurance</p> <p>Our Center of Excellence (COE) team is committed to unparalleled quality and drives our organization-wide pledge to maintain superior standards across every stage of our assessment process. It starts with deploying experienced assessment professionals, certified through Gordian's rigorous Facilities/Infrastructure Certification Program.</p> <p>Our commitment to excellence is embodied in our Quality Assurance/Quality Control processes, where we have woven AI-driven Natural Language Processing into our frameworks. This innovative approach enables our COE team to operate with heightened independence from our assessors, introducing an advanced layer of data verification. This ensures the highest standards of accuracy and reliability in our outputs.</p> <p>Data Qualification and Acceptance</p> <p>Following our internal review, Gordian conducts a data qualification meeting with your team to review a summary of identified needs to help guide the feedback process and make changes as required. If desired, detailed data can be provided for independent customer review. While the Customer's input is not required, it is valued to ensure the assessment's precision and depth. Any feedback provided is incorporated into the final deliverables.</p>
32	Describe any forecasting of potential renovations, upgrades, or modifications	Facility asset details captured include estimated renewal fees and may also include repair and upgrade costs. The standard investment time frame is defined over a 10-year horizon, allowing for precise cost forecasting by year. Gordian can adjust the time frame, as requested by the customer, to reflect shorter periods (5 years) or up to 30 years of forecasting. This detailed forecasting is integrated into the summary of needs and the project schedule, ensuring a well-implemented strategy.

<p>33</p>	<p>Describe any cost analysis and budgeting tools you utilize and how the information is shared with stakeholders.</p>	<p>The cost analysis and budgeting tools utilized by Gordian and how this information is shared with stakeholders are provided below. These tools are integral to ensuring that facility condition assessments and capital planning processes are both effective and aligned with the strategic goals of the organization.</p> <p>Once the customer's facility condition assessment is complete, Gordian engages them through the following steps:</p> <p>Strategic Assessment Insights Development</p> <ul style="list-style-type: none"> Customize Strategic Tools. Successful long-term planning requires more than a technical baseline. Gordian uses an array of strategic concepts as tools to tie facilities projects to the mission and vision of leadership and define a framework for reinvestment funding. The primary strategic and functional prioritization tools are outlined below though others may be added as necessary to ensure a robust toolkit. <ul style="list-style-type: none"> Building Portfolios. Organizing facilities into a portfolio of assets provides the means to reflect existing priorities and future aspirations. Project Category. The classification of a project helps to differentiate between a "want" versus a "need." Project Package. Typical packages are Building Envelope, Building System, Infrastructure, Space Renewal, and Safety/Code. Timeframe. Multi-year investment timeframes—immediate investment needs, 1-3 years, 4-7 years, 8-10 years, etc.—establish useful investment horizons based on age and condition. Investment Criteria. Gordian uses Investment Criteria to help decision-makers understand the importance or impact of a project. Develop a Multi-year Capital Plan. The goal of the facility planning process is to define a credible, affordable, and actionable plan. To accomplish this, Gordian engages leadership in an exercise that guides future investment decisions and ensures the effective use of capital investment funds. Project Selection. With an investment plan in place, the process of deciding which projects to accomplish and in what sequence can commence. Understanding that annual priorities shift and impact project selection, these decision tools become an integral part of the planning and prioritization process moving forward. <p>Gordian works with your organization to assign a custom scoring methodology to rank projects within facilities where a condition assessment was conducted or those facilities that otherwise have modeled component-level detail.</p> <p>Strategic Assessment Insights Delivery</p> <p>Gordian deliverables are designed to effectively communicate findings to build broad support in the organization and integrate with existing management systems. Along with sessions throughout the process to gather necessary information and insights, Gordian delivers a completed strategic capital plan and recommendations for the next steps. This presentation recommends a strategic course of action as well as:</p> <ul style="list-style-type: none"> Provides context of historical funding levels and details backlog origin. Gives a summary-level overview of facilities needs highlighting key strategic issues. Summarizes Gordian's recommendation for a portfolio investment plan that ties to priorities and available funding. <p>As directed, an additional presentation can be given to senior leadership (e.g., CFO, President, Cabinet, Board of Trustees) or the appropriate audience at your organization.</p> <p>Employing a suite of strategic tools and methodologies, Gordian ensures that stakeholders receive clear, actionable insights into their facility's condition and investment needs. The structured approach to cost analysis and budgeting aids in effective decision-making and fosters transparency and alignment with the customer organization's long-term goals. Through detailed reports and strategic capital plans, Gordian provides stakeholders with the necessary information to make informed investment decisions and maintain the integrity and functionality of their facilities.</p>
<p>34</p>	<p>Describe your ability and willingness to provide your products and services to Sourcewell participating entities.</p>	<p>Gordian currently has customers in 47 states. We are able and willing to provide products and services to all Sourcewell participating entities in all 50 states of the United States, all provinces of Canada, and additional territories.</p>
<p>35</p>	<p>Describe your ability and willingness to provide your products and services to Sourcewell participating entities in Canada.</p>	<p>Gordian currently has an office and operations in Canada along with a large customer base and welcomes further participation in Canada for all our products and services.</p>

36	Identify any geographic areas of the United States or Canada that you will NOT be fully serving through the proposed agreement.	Not applicable. Gordian can provide products and services throughout the identified geographic areas.	*
37	Identify any account type of Participating Entity which will not have full access to your Solutions if awarded an agreement, and the reasoning for this.	Not applicable. Gordian will participate in all sectors and does not have existing contracts limiting the promotion of the contract.	*
38	Define any specific requirements or restrictions that would apply to our participating entities in Hawaii and Alaska and in US Territories.	Not applicable. Gordian has existing contracts in Hawaii and Alaska. We can accommodate specific requirements for those states and in the US Territories.	*
39	Will Proposer extend terms of any awarded master agreement to nonprofit entities?	Yes	*

Table 4: Marketing Plan (100 Points)

Line Item	Question	Response *
40	Describe your marketing strategy for promoting this opportunity. Upload representative samples of your marketing materials (if applicable) in the document upload section of your response.	<p>Gordian's marketing strategy for promoting the partnership with Sourcewell, upon being awarded, is designed to ensure maximum outreach and impact. This multifaceted approach leverages the following to effectively communicate the benefits of the partnership to a wide audience.</p> <ul style="list-style-type: none"> • Integrated Marketing Communications. We will continue to integrate Sourcewell's key messages into Gordian's established marketing plan, which spans various strategic industry sectors such as SLED, Higher Ed, Healthcare, and Federal markets. Our goal is to build upon Gordian's market reputation, leveraging a strong digital presence, partnerships, events, association memberships, and other promotional activities to drive demand and support sales. • Regional and Industry-Specific Campaign. Targeted marketing initiatives will be crafted to align with regional and industry-specific needs, promoting Sourcewell's messaging. A dedicated marketing representative will continue to collaborate with Sourcewell's marketing team to ensure alignment and develop a marketing plan, complete with quarterly reviews to adapt and refine strategies. • Sales Enablement and Collaborative Training. Post-award, we will continue to prioritize sales enablement, enhancing our internal training program for our sales and operations teams in conjunction with Sourcewell. This includes roll-out training, continuous educational sessions, and the provision of materials and FAQs to ensure our teams are well-equipped to communicate the benefits of our partnership. • Dual Branding and Member Education. Gordian and Sourcewell will work together to create co-branded collateral as necessary. Our website and marketing collateral will continue to highlight the unique benefits available to Sourcewell Members, including exclusive access to Gordian's solutions. We will conduct webinars and workshops to educate Members on best practices, reinforcing the strategic advantage of the Sourcewell-Gordian partnership. • Collaborative Promotion and Engagement. We will continue working closely with Sourcewell to co-create branded materials and disseminate success stories that illustrate the positive outcomes of our collaboration. Ongoing communication efforts will include updates, case studies, and narratives that showcase the efficacy of our solutions. <p>Please refer to the document upload section for representative samples of our marketing materials, which illustrate our commitment to quality and the strategic promotion of the Sourcewell contract. Gordian's Assessment and Capital Planning video can be viewed using this link: https://share.vidyard.com/watch/W1M5fdZWsKrb9eQX7c9D36</p> <p>Gordian aims to maximize the visibility and impact of the partnership with Sourcewell. Through targeted campaigns, collaborative training, and continuous engagement, Gordian ensures that the unique benefits of the partnership are communicated to stakeholders, driving demand and supporting sales. This approach reinforces the strategic advantage of the Sourcewell-Gordian partnership and highlights Gordian's commitment to quality and excellence in service delivery.</p>

41	Describe your use of technology and digital data (e.g., social media, metadata usage) to enhance marketing effectiveness.	<p>Gordian's comprehensive digital marketing strategy focuses on acquiring new Members and engaging current customers with personalized, authentic digital interactions where they participate in their own buying journey. Our approach includes:</p> <ul style="list-style-type: none"> • Digital Marketing. Utilizing a mix of digital advertising, Search Engine Optimization (SEO), social media marketing, email campaigns, and interactive content to reach and resonate with our audience, we focus on creating personalized experiences that support Members' unique journeys. By harnessing the power of metadata from digital interactions, we tailor our marketing efforts to individual preferences and behaviors. This allows us to deliver highly relevant content and offers to users, enhancing the Member experience and increasing engagement. • Social Media. Our social media campaigns on platforms like LinkedIn, Facebook, and X (Twitter) are optimized through the strategic use of metadata, enabling us to target specific regions, industries, organization types, and personas with precision, thereby amplifying the impact of our messaging. • Contract Integration. We incorporate our ongoing contract with Sourcewell into our broader digital marketing strategy, using metadata insights to craft targeted campaigns that underscore the unique advantages of our partnership, tailored to the specific needs of regional audiences. <p>Our commitment to leveraging technology and digital data is a cornerstone of our strategy, aimed at delivering measurable marketing outcomes and supporting the growth of our partnership with Sourcewell.</p>	*
42	In your view, what is Sourcewell's role in promoting agreements arising out of this RFP? How will you integrate a Sourcewell-awarded agreement into your sales process?	<p>Gordian's strategic partnership with Sourcewell enhances our outreach and service capabilities, ensuring that our solutions are effectively presented and accessible to Sourcewell Members. Below is an insight into how this collaboration works and the benefits it brings.</p> <ul style="list-style-type: none"> • Sourcewell's Role. Gordian collaborates closely with the Sourcewell sales team, offering specialized training on our products and services. By equipping the Sourcewell team with in-depth knowledge of Gordian's solutions, we empower them to effectively communicate the benefits to potential Members. This partnership facilitates a cohesive and informed sales strategy, enhancing our mutual success in reaching and serving Sourcewell Members. Additionally, Sourcewell will also include Gordian-generated success stories and relevant materials in Member communications. • The Gordian Sales Process. Existing Sourcewell Members can access the Sourcewell Co-op option during the sales cycle. When Gordian sources the lead independent of a Sourcewell alignment request form, the Sourcewell Co-op option is made available during the sales cycle. Should a prospective Gordian customer/new Sourcewell Member want to pursue Gordian's services using the Sourcewell Co-op agreement, we make that available. <p>At the time of contract maturity, Gordian offers the Sourcewell Co-op agreement as an option to any current Gordian customers who are also Sourcewell Members.</p>	*
43	Are your Solutions available through an e-procurement ordering process? If so, describe your e-procurement system and how governmental and educational customers have used it.	No, Gordian's Planning Solutions are not currently available through an e-procurement process.	*

Table 5A: Value-Added Attributes (100 Points)

Line Item	Question	Response *	
44	Describe any product, equipment, maintenance, or operator training programs that you offer to Sourcewell participating entities. Include details, such as whether training is standard or optional, who provides training, and any costs that apply.	<p>As part of our services, Account Managers work with our customers to provide training as part of the solution fee. We also have a Customer Service department available to answer questions and troubleshoot issues with customers. More information can be found in Table 3, question 30.</p> <p>Optionally, Gordian offers instructor-led on-site training both in the United States and Canada for up to 12 students. The fee is based on our bill rate and the number of hours anticipated for successful on-site training.</p>	*

<p>45</p>	<p>Describe any technological advances that your proposed Solutions offer.</p>	<p>Gordian's Assessments and Capital Planning (ACP) Solution on the Gordian Cloud Platform (GCP) is designed to address the complex challenges faced by facilities management professionals and business executives. Here is a breakdown of how our technology advances the field of facility management and capital planning:</p> <ul style="list-style-type: none"> • Saas Foundation. The GCP is built on an integrated software-as-a-service (SaaS) foundation, providing a seamless and consistent user experience across various applications and capabilities. The platform's advanced search capabilities allow users to quickly locate asset data, streamlining the assessment process and saving time. Multiple views of asset data, including card view and map view, help validate asset data's accuracy and present the information easily. • Mobile Asset Capture. Gordian Asset Capture provides a mobile-native app with built-in intelligence and automation, enabling assessors to capture asset data efficiently in the field. The data is instantly synced to the ACP platform, minimizing the need for manual data entry and reducing the potential for errors. ACP provides a comprehensive assessment workflow, allowing assets to be sent to specific assessor's mobile devices for reassessment utilizing existing data. • RSMeans Data Incorporation. By incorporating RSMeans Data, the GCP provides users with up-to-date and localized construction cost data to develop cost estimates for facilities, systems, assets, and requirements, which is crucial for accurate budgeting and forecasting. The GCP allows users to map out future capital needs, predict asset replacements, and update project information easily, thanks to an intuitive user interface with features like fly-out panels and in-line editing. • Visualization Dashboards. These customizable dashboards give stakeholders a clear view of asset conditions, helping to inform decision-making and prioritize projects. The GCP includes tools for determining appropriate funding levels and objectively prioritizing projects, ensuring transparency and reducing bias in the decision-making process. All necessary capabilities for planning, asset data management, estimating, and procurement are combined in a unified platform, promoting consistency of data and ease of use. • Single Source of Truth. The Project Workspace is a single source of truth, with the ability to connect planning and asset data with estimating and procurement capabilities, should the customer want to facilitate collaboration among customer stakeholders and ensure data accuracy and consistency throughout the building life cycle. <p>The GCP's comprehensive data capture, analysis, and visualization tools, combined with its integration of industry-leading cost data and customizable service tiers, position it as a powerful solution for optimizing facilities management in various sectors, including SLED, higher education, healthcare, and federal.</p>
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<p>46</p>	<p>Describe any “green” initiatives that relate to your company or to your Solutions, and include a list of the certifying agency for each.</p>	<p>Gordian is dedicated to advancing sustainability through various green initiatives that align with our commitment to environmental stewardship and responsible business practices. Our efforts are designed to minimize environmental impacts while ensuring the health and safety of our associates, customers, and local communities. “Green” initiatives that relate to our company include:</p> <p>1. As a Fortive operating company, Gordian is committed to sustainable business practices that minimize environmental impacts and ensure the health and safety of our associates, customers, and our local communities nationwide. Fortive’s 2023 Sustainability Report was prepared in alignment with the following frameworks:</p> <ul style="list-style-type: none"> • The Global Reporting Initiative (GRI) standards: Core (2021 standard) • The Sustainability Accounting Standards Board (SASB) standard for Electrical & Electronic Equipment (RT-EE version 2018-10) • The Task Force on Climate-Related Financial Disclosure (TCFD) framework • The United Nations Global Compact • The United Nations Sustainable Development Goals (UN SDGs) In addition, we report our complete greenhouse gas (GHG) profile and performance via the CDP Climate Change disclosure each year. <p>2. Gordian operates following our Environmental, Health, and Safety (EHS) Policy utilizing the following principles in conducting our business:</p> <ul style="list-style-type: none"> • Compliance with applicable environmental, health, and safety laws and regulations and applicable corporate and business unit policies, standards, and procedures. • Periodic, formal evaluation of our compliance. • Integrity and accountability in personal conduct. • Gordian employees are expected to understand the EHS issues associated with their jobs and to act in an environmentally responsible, sustainable, and safe manner. • Continuous improvements in EHS performance, waste minimization, prevention of pollution, promotion of sustainable practices and policies, and prevention of workplace accidents and injuries. • Integration of sound environmental, health, and safety programs and practices into applicable business functions, including procurement, product design, product testing, product support, service, and facilities and real-estate operations. • Sensitivity to community concerns about environmental, health, and safety issues. <p>Gordian is committed to promoting sustainability through our innovative solutions. Our green initiatives include:</p> <ul style="list-style-type: none"> • Gordian’s Green Building Costs with RSMeans: This AI-driven, SaaS-based estimating tool empowers construction professionals to accurately estimate, plan, and budget for green construction projects, whether they involve new commercial buildings or renovations. From high-efficiency infrastructure systems and building shell materials to photovoltaic panels, green roofs, and wind power, RSMeans simplifies construction management, making it more scalable and sustainable. • Energy Assessments: Gordian provides comprehensive energy assessments to identify potential energy conservation opportunities for individual buildings or entire portfolios. These assessments deliver detailed data and reports on a building’s energy usage, helping to pinpoint areas where energy savings can be achieved. • Green Building Assessments. Gordian’s Green Building Assessment (GBA) provides critical insights into a customer’s current sustainability practices, forming the foundation for a comprehensive sustainability plan. By collaborating with the customer, Gordian defines essential performance indicators such as Energy Use Intensity (EUI), Water Use Intensity (WUI), and Energy Star ratings to benchmark assets and set targeted goals for improvement. • Campus Sustainability Benchmarking. Gordian’s Campus Sustainability solution helps enhance environmental stewardship, connect sustainability to other campus investments, and communicate plans to various constituencies on campus. <p>By integrating these green initiatives into our operations and solutions, Gordian promotes sustainable practices and helps our customers achieve their environmental goals, ultimately contributing to a healthier planet and a more sustainable future.</p>
<p>47</p>	<p>Identify any third-party issued eco-labels, ratings or certifications that your company has received for the Solutions included in your Proposal related to energy efficiency or conservation, life-cycle design (cradle-to-cradle), or other green/sustainability factors.</p>	<p>Not applicable</p>

<p>48</p>	<p>Describe approaches used by your company to align recommendations with an owner's sustainability goals.</p>	<p>We understand the importance of aligning our recommendations with an Owner's sustainability goals. Our approach ensures that our assessments and solutions meet immediate needs and contribute to long-term environmental sustainability. By incorporating various strategies, we help owners achieve their sustainability objectives while maintaining the integrity and functionality of their facilities. Gordian can use the following approaches to align our recommendations with an owner's sustainability goals:</p> <ul style="list-style-type: none"> • Include energy efficiency evaluations in the assessment to identify areas where the owner can reduce energy consumption. • Suggest using eco-friendly materials for repairs and upgrades that meet sustainability standards. • Provide a lifecycle cost analysis of systems and materials considering long-term sustainability benefits and immediate costs. • Focus on improvements that offer significant sustainability benefits, such as LED lighting retrofits or HVAC system upgrades. • Propose integrating renewable energy sources, like solar panels, into the facility's energy mix. • Tailor recommendations to help the facility achieve or maintain LEED certification or other green building standards. • Ensure that the recommendations align with the owner's environmental policies and any regulatory compliance requirements. • Encourage the inclusion of sustainability goals in the decision-making process by facilitating engagement with all stakeholders. <p>By employing these approaches, Gordian ensures that our recommendations effectively support owners in advancing their sustainability goals. Through tailored solutions and strategic planning, we enable owners to make informed decisions that align with their environmental policies and regulatory requirements.</p>
<p>49</p>	<p>What unique attributes does your company, your products, or your services offer to Sourcewell participating entities? What makes your proposed solutions unique in your industry as it applies to Sourcewell participating entities?</p>	<p>Gordian's Assessments and Capital Planning (ACP) solution on the Gordian Cloud Platform (GCP) is a comprehensive, multi-tiered service designed to empower business executives, facilities leaders, assessors, and project managers across various market segments with the tools needed to make informed decisions regarding facility management and capital investment. Here are the unique attributes and offerings of our solution:</p> <ul style="list-style-type: none"> • Comprehensive Approach. The GCP ensures data consistency and pricing reliability through rigorous data validation processes. Cost engineers spend thousands of hours annually researching and verifying cost data, providing customers with accurate and up-to-date cost information across assessments. • RSMMeans Data. Gordian's industry-leading construction cost database contains over 92,000 line items. Each year, cost engineers dedicate more than 30,000 hours to researching and validating these costs. RSMMeans is directly integrated with our Assessment and Capital Planning solutions, offering customers unique access to this construction cost database, ensuring they are using the most reliable and comprehensive data available for their planning and assessment needs. Gordian is the only organization that can offer a solution that is truly integrated with RSMMeans. • Asset Data Capture. Facilitated by Gordian's mobile-native app and AI-driven image descriptions, asset data capture enables swift and accurate data collection in the field, including geolocation, detailed asset specifics, and one-time deficiency requirements. This data is seamlessly integrated with the GCP, supported by Intelligent Search capabilities for efficient data retrieval. This provides customers with a powerful tool for efficient and accurate data collection, integration, and retrieval, ultimately supporting better facility management and capital planning decisions. Additionally, Gordian's assessment teams use this tool to conduct assessments, which ensures consistency with assessments conducted by customers. • Facility Condition Assessment. Our platform stands out with its comprehensive approach to data consistency and pricing, ensuring reliable, comparable insights across assessments. The solution offers multiple service tiers to suit varying needs: <ul style="list-style-type: none"> Facility Condition Assessment+: An on-site, detailed system-level inventory outlining deficiencies and remedial actions by industry experts, ideal for addressing deferred maintenance, meeting code compliance, and long-range capital plans. Facility Condition Assessment: System-level lifecycle-based inventory augmented by customer's institutional knowledge, suitable for those with knowledgeable facilities staff. Modeled Assessment: Software-based service for high-level funding decisions across multiple similar buildings, utilizing data extrapolation. Self-Assessment: A software-only option where customers' in-house teams use Gordian's technologies for asset data collection and management. • Workflow Integration and Collaboration. Gordian's Workflow Integration and Collaboration feature offers customers a unified SaaS platform that seamlessly connects planning, asset data, estimating, and procurement. This integration ensures data accuracy and consistency through the Project Workspace, serving as a single source of truth. With mix-and-match functionality and efficient reassessment workflows, the platform adapts to meet each customer's unique requirements, driving better alignment, communication, and decision-making. This comprehensive approach empowers customers to streamline their processes,

		<p>enhance collaboration, and confidently make informed decisions. Note: Gordian is only proposing our facility assessment and planning services and solutions in this contract.</p> <ul style="list-style-type: none">• Proprietary Software Development. Gordian develops its software, giving us a unique advantage in offering a full solution with deep domain expertise. The Gordian Cloud Platform includes Building Lifecycle management, data insights, predictive costs, and more, ensuring a robust and effective solution for your facility assessment and planning needs.• Strategic Assessment Insights. Gordian's Strategic Assessment Insights solution helps organizations define a multi-year investment plan by treating each facility and grounds feature as an investment-worthy asset. This approach ensures that investments align with the organizational mission and prioritize high-impact areas. After completing an assessment, Gordian customizes strategic tools, develops a credible and actionable multi-year capital plan, and assists in project selection. We assign a custom scoring methodology to rank projects and deliver findings that integrate with your management systems. Our experts help drive decision-making and ensure the plan is actionable and aligned with your strategic goals—not just a binder that sits on a shelf.• Stakeholder Engagement. Gordian's Portfolio Dashboard and Capital Planning and Strategy Development tools significantly benefit customers. The Portfolio Dashboard provides a powerful visualization tool that allows stakeholders to see asset conditions, aiding in informed decision-making. Supported by Gordian's capital strategy expertise, stakeholder alignment experience, and executive-level materials, this feature ensures that users can effectively engage stakeholders at every level, enhancing transparency and communication. Additionally, the GCP offers strategic planning tools, including Funding Models to understand investment impacts and Project Prioritization to rank projects objectively, ensuring transparency and reducing bias. This comprehensive approach drives better alignment, communication, and decision-making across the customer organization.• Expert-Driven Service. Backed by professional services, Gordian's solution leverages expertise and insights to complement our technology, ensuring that customers receive a data-rich and insight-driven service.
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Table 5B: Value-Added Attributes

Line Item	Question	Certification	Offered	Comment
50	Select any Women or Minority Business Entity (WMBE), Small Business Entity (SBE), or veteran owned business certifications that your company or hub partners have obtained. Upload documentation and a listing of dealerships, HUB partners or re-sellers if available. Select all that apply.		<input type="radio"/> Yes <input checked="" type="radio"/> No	
51		Minority Business Enterprise (MBE)	<input type="radio"/> Yes <input checked="" type="radio"/> No	
52		Women Business Enterprise (WBE)	<input type="radio"/> Yes <input checked="" type="radio"/> No	
53		Disabled-Owned Business Enterprise (DOBE)	<input type="radio"/> Yes <input checked="" type="radio"/> No	
54		Veteran-Owned Business Enterprise (VBE)	<input type="radio"/> Yes <input checked="" type="radio"/> No	
55		Service-Disabled Veteran-Owned Business (SDVOB)	<input type="radio"/> Yes <input checked="" type="radio"/> No	
56		Small Business Enterprise (SBE)	<input type="radio"/> Yes <input checked="" type="radio"/> No	
57		Small Disadvantaged Business (SDB)	<input type="radio"/> Yes <input checked="" type="radio"/> No	
58		Women-Owned Small Business (WOSB)	<input type="radio"/> Yes <input checked="" type="radio"/> No	

Table 6: Pricing (400 Points)

Provide detailed pricing information in the questions that follow below.

Line Item	Question	Response *
59	Describe your payment terms and accepted payment methods.	Gordian uses progress billing for our Assessment and Capital Planning Products. Our payment terms are Net 30 days and Gordian accepts automated clearing house (ACH)/check bank payments.
60	Describe any leasing or financing options available for use by educational or governmental entities.	Not applicable
61	Describe any standard transaction documents that you propose to use in connection with an awarded agreement (order forms, terms and conditions, service level agreements, etc.). Upload all template agreements or transaction documents which may be proposed to Participating Entities.	We have uploaded the file Table 6-Pricing-Question 61-Gordian Additional Terms. This document outlines Gordian's terms governing SaaS subscriptions, intellectual property rights, and data ownership between the customer and Gordian, including licensing, deliverables, benchmarking services, content, and service ownership. It also outlines the customer's obligations to protect the Gordian's intellectual property and cooperate in enforcing these rights.
62	Do you accept the P-card procurement and payment process? If so, is there any additional cost to Sourcewell participating entities for using this process?	No, Gordian does not accept the P-card procurement and payment process. Payment must be made via ACH/check bank payment.

<p>63</p>	<p>Describe your pricing model (e.g., line-item discounts or product-category discounts). Provide detailed pricing data (including standard or list pricing and the Sourcewell discounted price) on all of the items that you want Sourcewell to consider as part of your RFP response. If applicable, provide a SKU for each item in your proposal. Upload your pricing materials (if applicable) in the document upload section of your response.</p>	<p>Gordian's pricing model is designed to offer flexibility and value to Sourcewell participating entities. By providing detailed pricing data, including standard or list pricing and Sourcewell discounted prices, we ensure transparency and ease of understanding. Our pricing structure encompasses various services and software solutions, tailored to meet the diverse needs of our customers:</p> <p>Software ACP module on the Gordian Cloud Platform</p> <p>Core Assessment Services Self Assessment Modeled Assessment Facility Condition Assessment Facility Condition Assessment+</p> <p>Assessment Service Add-Ons Accessibility Assessment (Level 2 & Level 3) Assessment Data Update Energy Assessments (ASHRAE Level 1) Equipment Inventory and Asset Tagging Green Building Assessments Preventive Maintenance Site Linear Assessment Site Linear Data Development Strategic Assessment Insights Strategic Assessment Insights Update</p> <p>Professional Service Add-Ons Capital Planning Program Development Workshop Flexible Professional Services</p> <p>Additional Planning Services Integrated Facilities Program (IFP) Return of Physical Assets (ROPA) Space Utilization Sustainability</p> <p>By offering a comprehensive and transparent pricing model, Gordian ensures that Sourcewell participating entities can easily access and benefit from our wide range of services and software solutions. Our commitment to providing detailed pricing information, including discounts and SKUs, underscores our dedication to supporting Sourcewell Members in making informed decisions that align with their budgetary and operational needs.</p>
<p>64</p>	<p>Quantify the pricing discount represented by the pricing proposal in this response. For example, if the pricing in your response represents a percentage discount from MSRP or list, state the percentage or percentage range.</p>	<p>Gordian is committed to offering competitive pricing to Sourcewell participating entities. Our pricing model includes various discounts to ensure our services are accessible and cost-effective. Gordian's pricing offers:</p> <ul style="list-style-type: none"> • At least a 10% discount depending on the product and amount of space in the scope of work. • An additional discount for strategic capital planning analysis walkthrough condition assessments, reducing the \$/GSF fee from \$0.04/GSF to \$0.035/GSF. • An initial discount of 10% from the list price for ROPA, Sustainability, IFP, and Space Utilization services. • Decreased start-up fees for utilization services by more than 15%. ROPA service discounts are a little more complicated but substantial for smaller customers, reaching about 30% for some square-foot ranges. <p>Gordian ensures that Sourcewell participating entities benefit from significant cost savings while accessing our comprehensive range of services.</p>

65	Describe any quantity or volume discounts or rebate programs that you offer.	<p>To further enhance our offerings, we provide quantity and volume discounts based on annual spend, ensuring that our customers receive the best possible value for their investment. For Sourcewell Members with annual spend:</p> <ul style="list-style-type: none"> • \$2,000,000 to \$4,999,999, we will provide a 3% volume discount. • \$5,000,000 to \$9,999,999, we will provide a 5% volume discount • \$10,000,000 to \$14,999,999, we will provide a 10% volume discount • \$15,000,000+, we will provide a 15% volume discount. <p>By offering these volume discounts, Gordian ensures that Sourcewell participating entities can maximize their savings while accessing our comprehensive range of services.</p>	*
66	Propose a method of facilitating "sourced" products or related services, which may be referred to as "open market" items or "non-contracted items". For example, you may supply such items "at cost" or "at cost plus a percentage," or you may supply a quote for each such request.	<p>Our pricing model includes additional add-ons for certain services, which helps identify pricing for customized services within a specific product. However, if a nonstandard option or request arises, Gordian will provide a specific quote tailored to that request. This ensures that all sourced products or related services are priced accurately and fairly, reflecting the unique requirements of each request.</p>	*
67	Identify any element of the total cost of acquisition that is NOT included in the pricing submitted with your response. This includes all additional charges associated with a purchase that are not directly identified as freight or shipping charges. For example, list costs for items like pre-delivery inspection, installation, set up, mandatory training, or initial inspection. Identify any parties that impose such costs and their relationship to the Proposer.	<p>Certain elements of the total cost of acquisition are not included in the pricing submitted with our response. However, these additional charges are essential to consider for a complete understanding of the overall costs. The following elements are not included in Gordian's pricing submitted with our response:</p> <ul style="list-style-type: none"> • The fees described and priced within our attached tables do not include any reasonable Reimbursable Expenses, which shall be reimbursed at cost plus ten percent (10%). • For any contract between Gordian and any Sourcewell Member, the term "Reimbursable Expenses" shall include the costs of travel, business meals, lodging, communication costs, printing, and production costs. • Gordian will remit a One percent (1.00%) administrative fee assessed on all revenue collected from a Sourcewell Member that procures products and services from Gordian through a piggyback of this contract, excluding any reimbursement of Reasonable Expenses. <p>Gordian ensures that Sourcewell participating entities have a complete understanding of the total cost of acquisition to make informed decisions and effectively manage their budgets.</p>	*
68	If freight, delivery, or shipping is an additional cost to the Sourcewell participating entity, describe in detail the complete freight, shipping, and delivery program.	Not applicable.	*
69	Specifically describe freight, shipping, and delivery terms or programs available for Alaska, Hawaii, Canada, or any offshore delivery.	Gordian's services are available to any state in the United States, including Alaska and Hawaii, as well as Canada. Gordian has experience providing services to current customers in Alaska, Hawaii, and Canada.	*
70	Describe any unique distribution and/or delivery methods or options offered in your proposal.	<p>All of Gordian's services involve data collection, qualification/verification of information, and presentations of findings. To enhance efficiency, many of these phases can be completed remotely. By conducting certain tasks remotely, we can expedite the process and eliminate travel and reimbursable expenses. However, not all phases can be completed remotely. Therefore, we collaborate with our customers to determine which events are best conducted on-site, ensuring a seamless and efficient workflow.</p>	*

71	<p>Specifically describe any self-audit process or program that you plan to employ to verify compliance with your proposed agreement with Sourcewell. This process includes ensuring that Sourcewell participating entities obtain the proper pricing.</p>	<p>Gordian is dedicated to maintaining transparency and accountability in all our agreements. To ensure compliance with the Sourcewell agreement and guarantee that Sourcewell participating entities obtain the proper pricing, we have implemented a self-audit process. The self-audit process Gordian follows to verify compliance with the Sourcewell agreement is as follows:</p> <ol style="list-style-type: none"> 1. When a new deal is sold through the Sourcewell contract, the sales team marks that sale as having been sold through the Sourcewell agreement. 2. At the end of each month, the month's sales are reviewed by the accountant preparing the report to ensure that each sale has been properly marked as being sold through the Sourcewell contract. This is done independently by reviewing the paperwork/PO associated with that contract and verifying if Sourcewell was used to procure that sale. 3. Lastly, once the accountant has completed their report, it is sent to the National Co-op Manager for final review to verify the proper rates have been used in calculating the Administrative Fee, and it is in accordance with the Sourcewell agreement. <p>This self-audit process ensures that all sales through the Sourcewell agreement are accurately tracked and compliant with the established guidelines. By maintaining rigorous checks and balances, Gordian upholds its commitment to transparency and accountability, ensuring that Sourcewell participating entities receive the proper pricing and benefits from our services.</p>	*
72	<p>If you are awarded an agreement, provide a few examples of internal metrics that will be tracked to measure whether you are having success with the agreement.</p>	<p>To ensure the success of the agreement, Gordian employs a set of internal metrics that provide comprehensive insights into our performance. These metrics help us track progress, identify areas for improvement, and ensure that we are meeting our goals effectively. Gordian tracks the following key internal metrics to measure the success of the agreement:</p> <ul style="list-style-type: none"> • Bookings. Monitoring the total value of contracts signed, which provides a clear indication of our sales performance and market penetration. • Number of New Deals Added. Keeping track of the new opportunities generated helps us understand our ability to attract and engage new customers. • Win Rates. Analyzing the percentage of deals won compared to the total number of deals pursued, reflects our competitiveness and effectiveness in closing deals. • Pipeline Volume. Assessing the total value of potential deals in the sales pipeline gives us a forward-looking view of our sales prospects and potential revenue. • Revenue Targets. Measuring actual revenue against set targets ensures that we are on track to meet our financial goals and commitments. <p>By tracking these internal metrics, Gordian ensures that we have a clear and actionable understanding of our performance under the agreement allowing us to make informed decisions, optimize our strategies, and achieve success in our partnership with Sourcewell.</p>	*
73	<p>Provide a proposed Administration Fee payable to Sourcewell. The Fee is in consideration for the support and services provided by Sourcewell. The propose an Administrative Fee will be payable to Sourcewell on all completed transactions to Participating Entities utilizing this Agreement. The Administrative Fee will be calculated as a stated percentage, or flat fee as may be applicable, of all completed transactions utilizing this Master Agreement within the preceding Reporting Period defined in the agreement.</p>	<p>2%</p>	*

Table 7: Pricing Offered

Line Item	The Pricing Offered in this Proposal is: *	Comments
74	The pricing offered is as good as or better than pricing typically offered through existing cooperative contracts, state contracts, or agencies.	Option A *

Table 8A: Depth and Breadth of Offered Solutions (200 Points)

Line Item	Question	Response *
75	Provide a detailed description of all the Solutions offered, including used, offered in the proposal.	<p>Gordian offers a comprehensive suite of solutions to enhance facilities management and drive strategic improvements. Our core services include the following, each tailored to meet the unique needs of customers:</p> <p>Assessments and Capital Planning. Our core business is the measurement and strategic assessment of facilities assets, we help drive new policies that create change and improve facilities operations. Gordian professionals' experience within both the facilities and financial arenas provides organizations with solutions that are realistic, quantifiable, and financially obtainable. Our analysis remains rigorous and completely objective. Gordian offers multiple levels of assessments to fit desired outcomes to budgets. These include self-assessments, modeling, FCA, and FCA+. Each level offers a specific amount of detail versus cost; these levels can be "mixed and matched" with a customer's portfolio, ensuring the most efficient use of the customer's budget.</p> <p>In today's facilities environment, there is always going to be more capital need than available funding. So how does an organization decide which projects to fund and which to defer? To answer the question, many organizations conduct a Facility Condition Assessment (FCA) to understand the magnitude of the problem. Although often successful at establishing the funding shortfall and level of deficiencies, these studies rarely result in actionable plans and campus-wide support for the capital strategy needed to address the core issues that leaders face.</p> <p>Capital Planning takes the FCA to the next level utilizing engineering professionals and data analysts who do more than merely assemble a list of needs. Gordian works hand in hand with the facilities managers and other key stakeholders to engage across the organization or community to design capital plans that marry technical needs with strategic vision and financial capacity. Using our Building Portfolio process, Gordian takes an overwhelming backlog and guides decision-making so organizations can improve their facilities and slow the ongoing rate of project deferral.</p> <p>Site Linear Data Development and Assessment. The FCA Site Linear Data Development and FCA+ Site Linear Assessment involve a thorough review of the same systems, with active collaboration with customer personnel to ensure data accuracy and relevance. The key difference between the two lies in their evaluation methods: FCA data development emphasizes virtual collaboration and predictive modeling, while FCA+ assessment includes physical site inspections and a more detailed analysis of asset conditions. Both approaches aim to equip the customer with the necessary information for informed decision-making regarding maintenance prioritization, capital planning, and strategic investment in site and utility infrastructure. Gordian's approach to site linear data development and assessment includes evaluating and analyzing systems such as roadways, parking lots, exterior steps, and various site improvements and utilities. This process involves interviews with facility personnel, data migration to the Gordian Cloud Platform, and predictive modeling to forecast future maintenance needs and aid strategic decision-making.</p> <p>Americans with Disabilities Act Compliance Assessment. Gordian conducts Americans with Disabilities Act (ADA) accessibility assessments for customer buildings, offering both Tier II and Tier III services. The Tier II assessment is a streamlined survey using representative sampling and targeted measurements to identify major accessibility issues, following ASTM E2018 and 2010 ADA standards. In contrast, the Tier III assessment is a comprehensive evaluation involving detailed visual inspections and precise measurements of all accessible spaces, ensuring compliance with both federal and state-specific building codes. Findings from both assessments are entered into the Gordian Cloud Platform database as Work Items under the "Safety/Code" category, with prioritization based on the date of construction or installation. The assessments cover areas such as parking, accessible routes, building entrances, interior routes and amenities, elevators, toilet rooms, and hospitality guestrooms. Deliverables include checklists and work item lists in Excel format, with Tier III assessments providing more detailed room or area-wide data.</p>

Equipment Inventory and Asset Tagging. Gordian conducts an inventory assessment of fixed, visibly accessible equipment by capturing detailed information for each piece of equipment to be uploaded to the customer's Computer Maintenance Management System (CMMS). Each item is tagged with a unique bar code serving as its identifier. Gordian collaborates with the customer on asset naming conventions and ensures all required data fields are captured in the proper format for CMMS integration. The inventory includes manufacturer, model number, serial number, capacity, location, date placed in service, and equipment condition. Equipment in confined or unsafe locations is recorded based on technical drawings and maintenance staff input. Major equipment to be inventoried includes boilers, chillers, air handling units, generators, and more. Exclusions include smaller or inaccessible items like individual VAV boxes and HVAC sensors, but additional inventory services can be negotiated if needed.

Energy Assessment. The Gordian Energy Assessment Service is a comprehensive process designed to evaluate and enhance the energy efficiency of facilities. The assessment involves reviewing utility bills, interviewing facility personnel, and conducting walkthroughs to identify energy conservation opportunities. The process is divided into four phases: Project Initiation, Assessment, Data Development, and Deliverables. During the Project Initiation phase, Gordian's Project Manager collaborates with customer staff to review current energy costs and operating schedules. The Assessment phase includes a kickoff meeting and a facility walkthrough to gather detailed information on energy usage. In the Data Development phase, energy data is entered into Gordian's software, and conservation opportunities are evaluated based on cost, savings, and return on investment. Finally, the Deliverables phase involves preparing a detailed report with findings, recommendations, and budgetary pricing for energy conservation measures, along with simple payback and ROI calculations. This thorough approach ensures the customer receives actionable insights to improve energy efficiency and reduce costs.

Green Building Assessment. The Green Building Assessment (GBA) provides critical insights into a customer's current sustainability practices, forming the foundation for a comprehensive sustainability plan. By collaborating with the customer, Gordian defines essential performance indicators such as Energy Use Intensity (EUI), Water Use Intensity (WUI), and Energy Star ratings to benchmark assets and set targeted goals for improvement. The GBA focuses on five key sustainability domains and integrates them with existing Facilities Condition Assessment data, playing a crucial role in budgetary decisions and long-term capital planning. This ensures that sustainability is a core consideration in the customer's strategic development, offering benefits like continuity with sustainable building plans, enhanced budget prioritization, and tracking key performance indicators for reporting and comparison purposes.

Preventive Maintenance. Gordian's Preventive Maintenance (PM) service involves crafting tailored maintenance schedules for the customer by reviewing facilities, equipment, and staffing. This service extends the standard facility condition assessment by cataloging systems for routine inspections and maintenance, with each component rated by condition. Recommended PM tasks and frequencies are generated based on manufacturer guidelines, industry best practices, and the experiences of the customer and consultants. The approach ensures that similar equipment receives comparable maintenance tasks, with adjustments made based on real-world performance and feedback. PM plans are dynamic and evolve to optimize efficiency and effectiveness, ensuring that maintenance tasks are appropriately assigned and updated as needed.

Strategic Assessment and Insights. Gordian's Strategic Assessment Insights solution is designed to help organizations develop a multi-year investment plan by treating each facility and grounds feature as an investment-worthy asset. This approach allows decision-makers to target investments that align with the organization's mission and prioritize funding effectively. The process involves customizing strategic tools, developing a multi-year capital plan, and selecting projects based on a custom scoring methodology. Gordian works closely with leadership to tailor the framework to the organization's needs, ensuring that each dollar is allocated to the highest priority. The deliverables include a strategic capital plan, recommendations for the next steps, and ongoing post-project support to ensure the effective management of facilities and assets.

Data Migration. In partnership with the customer Gordian plans and executes the integration of critical data into the Gordian Cloud Platform, ensuring a seamless transition. The initial phase involves mapping and migrating current data to the Uniformat II standard, linking lifecycles and costs to Gordian's RSMeans data. This process includes analyzing the current data's structure, identifying essential data for transfer, and ensuring accurate alignment with the new application's fields. Interviews with customer supervisors are conducted to update costs, evaluate the timing of needs, and tailor the project schedule to the organization's current state. Ensuring data integrity throughout the transition is critical, involving pre-transition assessments, thorough cleaning, and standardization. After the transition, users are given access to

an ever-improving ecosystem where they can access key details on projects, download data reports, and access charts and graphs. Gordian provides support and customization during the setup process to ensure each user has easy access to the most valuable information and is equipped with the knowledge to utilize it.

Capital Planning Program Development Workshop. Gordian's Capital Planning Program Development framework helps organizations create a coordinated approach to capital planning, aligning their processes with industry best practices. This framework enables organizations to better understand their current capital planning process, achieve a higher ROI on their capital planning software investment, increase productivity, and deliver information efficiently. By developing a short-, intermediate-, and long-term roadmap, organizations can establish a robust and scalable program. Gordian's approach includes a project kick-off meeting, a pre-workshop to review goals and objectives, a two-day on-site workshop to analyze the current capital planning process, and the development of recommendations and strategies for improvement. The deliverables include a roadmap illustrating recommendations, a draft report outlining the situation analysis, goals, and objectives, and a final report incorporating feedback. Additionally, Gordian offers an optional service to create a process map that illustrates how the Gordian Cloud Platform and facility condition assessment data can be effectively leveraged into the organization's capital planning process.

Flexible Professional Service Hours. Gordian's Flexible Professional Services Hours are designed to provide individualized assistance to ensure software usage comfort, proficiency, and adoption. Customers can connect with a solution consultant via phone or web conference for help with generating reports, extracting data, or updating database records. An initial block of 20 hours is provided, with additional hours available upon request. These services are delivered remotely, and travel expenses are billed separately if on-site visits are needed. The hours can be used for various tasks, including mobile software functionality, platform data management, and capital planning best practices, but do not cover formal training classes or consulting workshops.

Return on Physical Assets (ROPA). Physical facilities represent the largest investment most organizations will make. Most see buildings as a depreciating asset and look to avoid expenditures unless necessary rather than treat them as real investments and seek a strong return.

The Return on Physical Assets (ROPA) provides the data, contextual understanding, and strategic recommendations to steward facilities most effectively. Gordian partners with organizations to develop an analytical framework and dialogue with stakeholders that aligns space, capital, and operational needs. This objective performance analysis provides facilities and finance administrators with the context and validation needed to evaluate investment tradeoffs and helps ensure facilities best serve the community.

Space Utilization. Colleges and universities are under more pressure than ever to use campus spaces to their full potential. Finding common ground with stakeholders can be problematic in the face of demands to decrease costs, respond to changing enrollment, and fairly evaluate space ownership.

Space Utilization solution helps campus administrators separate fact from fiction and make fiscally responsible decisions around space usage. Using advanced data analytics and a thorough assessment of teaching spaces, Gordian helps optimize the use of existing assets to avoid unnecessary costs and provide a foundation for strategic campus growth. Tailored recommendations empower administrators to make more informed decisions, negotiate around both shared and owned spaces, and produce results that satisfy all campus stakeholders.

Campus Sustainability. Being an effective steward of your facilities is one thing. Acting as a good steward of the environment requires a different set of tools entirely. Gordian provides campus sustainability professionals with Benchmarking and Reporting tools that ease the time-consuming burden of continuous data collection and reporting. This opens up more time for pursuing their true mission: advocating and implementing campus policies that minimize impact on the planet. Whether the goal is to measure carbon footprint, fulfill STARS, Carbon Commitment, Sierra Club, and/or Princeton Review reporting requirements, Gordian has a sustainability solution that can help.

By leveraging Gordian's expertise and innovative solutions, customers can effectively manage their facilities, optimize resource allocation, and achieve their strategic goals while promoting sustainability and operational excellence.

Integrated Facilities Program. Gordian's Integrated Facilities Program (IFP) equips higher education institutions with a suite of analytical tools and expert insights to revolutionize facilities management. This program aligns the management of physical assets with the institution's strategic objectives, fostering a collaborative environment among all stakeholders. It ensures that investments in facilities are both purposeful

		and impactful, supporting the university's mission and meeting the evolving needs of its community. With this approach, campuses can expect enhanced functionality, sustainability, and strategic growth of their educational spaces. The IFP solution helps create an analytical decision-making framework that aligns facility initiatives with strategic priorities, ensuring that every dollar available on campus is invested with purpose and precision. By leveraging peer and historical benchmarking, capital needs assessment, and teaching space utilization assessment, Gordian provides a comprehensive approach to facilities management that drives strategic growth and operational efficiency.
76	Within this RFP category there may be subcategories of solutions. List subcategory titles that best describe your products and services.	<p>Gordian works with r customer organizations to manage their facilities operations and capital investments better using data. We assess the current condition of their facilities, analyze the operational performance of those facilities, and benchmark every aspect of their operation against peers to make reliable, data-driven decisions that support the customer's mission. The subcategories that best describe our services are:</p> <ul style="list-style-type: none"> • Facilities and building condition assessment and auditing • Energy, utility, and emission assessments and planning • Space utilization and planning • Feasibility, sustainability, and lifecycle assessment • Benchmarking services and quality assurance • Asset, capital, and deferred maintenance planning and asset classification <p>Gordian's approach to facilities management and capital investment ensures that customers can make informed, data-driven decisions. By leveraging our expertise in various subcategories, we help customers achieve their strategic goals and enhance their operational efficiency.</p>

Table 8B: Depth and Breadth of Offered Solutions

Indicate below if the listed types or classes of Solutions are offered within your proposal. Provide additional comments in the text box provided, as necessary.

Line Item	Category or Type	Offered *	Comments
77	Facility and building condition assessment and auditing	<input checked="" type="radio"/> Yes <input type="radio"/> No	<p>Gordian has modified the information in this question response to fit the character limit. Detailed information and scopes for the Gordian Cloud Platform Software, Self Assessment, Modeled Assessment, FCA, and FCA+ can be found in the Upload Additional Document section.</p> <p>Gordian Cloud Platform Software Gordian's practices recognize that capital planning should not be a one-time exercise. Our solution is designed to complement your current planning systems: first by maintaining a live database so you can engage senior leadership as activity demands, and then by tracking performance to targets, which builds credibility for future appropriations. The following section details the software offered in the proposed solution. Gordian's RSMeans™ Construction Cost Data RSMeans Data is Gordian's industry-leading construction cost database. Gordian utilizes RSMeans construction cost data to develop cost estimates for facilities, systems, assets, and requirements. The RSMeans cost database contains more than 92,000-line items, and cost engineers spend more than 30,000 hours researching and validating the costs every year. Gordian is the sole provider of the RSMeans Assessment Dataset informed by decades of field work conducted by licensed professionals. Gordian and its subsidiaries have the exclusive right to integrate and utilize</p>

RSMeans Data in the FCA and capital planning software.

Gordian Cloud Platform
The Gordian Cloud Platform (GCP) is a comprehensive cloud-based solution that streamlines the building lifecycle by combining capital planning, estimating, and construction procurement into one seamless experience. Powered by industry-leading RSMeans Data, GCP enhances decision-making and data management with integrated workflows, automation, and insights for project selection, budgeting, and execution.

Asset Capture–Streamline Asset Capture and Evaluation
Gordian's Mobile Asset Capture application equips users with a comprehensive solution to digitally record facility assets on-site, combining a user-friendly interface with the ability to instantly capture photos and asset details, and integrate RSMeans Data in one seamless action. This results in a unified repository for all collected asset data, streamlining facility management, and decision-making.

Capital Planning–Understand Facility Conditions to Drive Project Prioritization and Selection
Creating a cohesive capital plan begins with thoroughly understanding your asset inventory and conditions. Armed with comprehensive asset data and the RSMeans cost information, your organization gains powerful analytical tools to prioritize asset replacement and chart the most strategic course of action.

Gordian's Capital Planning software offers an intuitive interface that simplifies the user experience, ensuring customers can fully leverage its capabilities. Accompanied by a comprehensive help system, it provides quick, accessible answers and resources, facilitating a swift and effective learning curve for all users.

Assessments and Capital Planning
Gordian's Capital Planning tools assist customers in defining a multi-year investment plan instead of simply picking projects. The Assessments and Capital Planning solution combines best-in-class condition assessments with strategic financial investment, highlighting core investment opportunities and detailing the risk of continued deferral. Our assessment data provides the foundation for a strategic approach that enables decision-makers to accurately target investments that reflect their organization's mission and ensure each dollar is allocated to the highest priority needs.

Self-Assessment
The Gordian Cloud Platform provides the foundation for all assessment offerings and can be used to support an in-house assessment. Leveraging our proprietary Asset Capture mobile application and Gordian Cloud

Platform, the data the customer generates is built on the same RSMeans Cost Data and connected to our planning and strategy tools. As an additional service, support from Gordian's experienced professionals is available to provide customers with guidance for the use of our standards, best practices, and software solutions.

Mobile Asset Capture

Gordian's Mobile Asset Capture application equips users with a comprehensive solution to digitally record facility assets on-site, combining a user-friendly interface with the ability to instantly capture photos and asset details, and integrate RSMeans Data in one seamless action. This results in a unified repository for all collected asset data, streamlining facility management, and decision-making.

Modeled Assessment

The modeled assessment process is delivered using data modeling concentrated on the essential systems of each facility, aiding in the comprehensive budgeting for potential capital expenditures.

Project Initiation Phase

The Project Initiation Phase of the assessment is the foundational stage where the groundwork for the entire assessment process is established.

- Introduction to the Project Team and Project Kick-off Meeting
- Set Goals
- Confirm Scope and Deliverables
- Communicate Management Plan

Data Collection

The Gordian Project Manager communicates with your facility and maintenance managers and staff members using email and teleconferencing to facilitate the collection of essential information required by our assessment teams.

This data typically includes additional asset information (e.g., floor plans, drawings, previous studies, recent capital improvements made and planned for, etc.).

System Configuration

For the Modeled Assessment service, data is configured up to Unifomat Level 3.

This baseline is built using experience from 20 years of facilities information within the Gordian database and leverages over 50,000 buildings as reference points to build the framework. Costs and life cycles for the assessment are linked directly to the RSMeans dataset, which is updated annually to ensure your cost data never becomes outdated.

Assessment Phase

The Assessment Phase is the fundamental step in building your assessment dataset in which Gordian professionals account for your unique facility characteristics.

Data Modeling

For facilities that are part of a modeled assessment, we conduct

data modeling that uses existing information to focus on the most critical systems in each facility that help you budget for all capital costs that could arise within a facility. Gordian accounts for the unique characteristics of your facilities while creating our framework to accommodate for differences in costs, life cycles, and even the systems themselves from facility to facility. During this customization process, Gordian also collects and assimilates outside data sources to ensure the models account for any available data which would increase their accuracy.

Data Development Phase

As we transition into the Data Development Phase, Gordian processes and refines the data collected on-site, ensuring that each facility's profile is accurately documented, costed, and analyzed for effective lifecycle management on the Gordian Cloud Platform.

Data Processing

After the on-site work is complete and the data has been synced to the Gordian Cloud Platform, the Gordian assessment team(s) reviews their notes and findings and complete the tasks of documenting each facility, including asset and/or requirement data updates, costing, estimated life, and reporting. All data is housed on the Gordian Cloud Platform.

Some organizations have experienced staff that are very knowledgeable about the facilities they manage. We are happy to collaborate with these professionals to help uncover issues that may not be immediately evident. When your staff has the capability and bandwidth to participate, our Gordian team can conduct interviews with your facilities personnel to capture their expert knowledge, ensuring that all known issues are accounted for and clarifying initial observations. These discussions help align with operational goals and establish accurate repair priorities and timelines. Engaging your team in this way aids in creating a comprehensive list of facility needs and fosters ownership and buy-in across your organization.

Facilities are broken down into their assets, and each facility may contain one or more assets. These assets are cataloged to provide a current inventory of what is inside the facility at the time of the assessment—for example, the type and quantity of roofing or ceiling materials (e.g., how much acoustical ceiling tile vs. gypsum wallboard ceilings).

For each asset, we determine two key pieces of information:

- Expected Useful Life. This is an estimation of how long an asset should last under normal conditions, based on industry standards and manufacturer guidelines (e.g., how long should this roof last?).
- Remaining Useful Life. Based on

the visual inspection, we assess how much longer the asset can continue to function effectively (e.g., how long can we expect the roof to last?). Next, Gordian determines the:

- Asset Replacement Cost. The cost of replacing the asset with current equivalent technology, using RSMMeans data for up-to-date pricing on materials and labor.
- Facility Replacement Value. We calculate replacement values using our Gordian Cloud Platform software and apply a \$/GSF cost estimate made up of a variety of different variables, including:
 - The size of the facility in Gross Square Feet (GSF)
 - Technical complexity of the facility according to the Gordian tech rating scale
 - Regional construction cost indexes
 - Function of the facility

Testing, measuring, or preparing calculations for any asset or component to determine adequacy, capacity, or compliance with any standard is outside the scope of assessment.

Data Quality Control and Assurance
Our Center of Excellence (COE) team is committed to unparalleled quality and drives our organization-wide pledge to maintain superior standards across every stage of our assessment process. It starts with deploying experienced assessment professionals, certified through Gordian's rigorous Facilities/Infrastructure Certification Program.

Our commitment to excellence is embodied in our Quality Assurance/Quality Control processes, where we have woven AI-driven Natural Language Processing into our frameworks. This innovative approach enables our COE team to operate with heightened independence from our assessors, introducing an advanced layer of data verification. This ensures the highest standards of accuracy and reliability in our outputs.

Data Qualification and Acceptance
Following our internal review, Gordian conducts a data qualification meeting with your team to review a summary of identified needs to help guide the feedback process and make changes as requested. If desired, detailed data can be provided for independent customer review. While the customer's input is not required, it is valued to ensure the assessment's precision and depth. Any feedback provided is incorporated into the final deliverables.

Deliverables Phase
Once the Data Development Phase is complete, we move to the Deliverables Phase which includes the presentation of findings and seek project completion acceptance from you.

Preliminary Findings Delivered and

Customer Review

An initial draft of our presentation of findings is created and provided for your review and feedback.

Presentation of Findings Delivered

Following the review, the Gordian Project Manager hosts a formal meeting dedicated to presenting the comprehensive results of the assessment. We recognize that facility conditions are just one of many considerations in decision-making for renovations or repairs, with mission impact, risk management, space planning, and usage changes also being critical factors.

The presentation of findings answers these key questions:

- What facilities do we need to maintain?
- What are the conditions (needs) of our facilities and assets?
- How much funding is required to keep up in the future?

Introduction and Orientation to the Gordian Cloud Platform

To ensure the continued accuracy of the assessment data, Gordian makes our information accessible to you and your team through our online platform, Gordian Cloud. This web-based platform is the central repository for all facilities' needs, strategic tools, and detailed assessment results. Our project team provides an introduction and orientation to this platform for your project team; this continues throughout your partnership with Gordian with our Customer Success team. We also introduce you to your personal Customer Success Manager, who is available to assist you beyond the initial project completion.

Project Completion

The project is considered complete when final reports have been delivered. If your organization is unable to respond promptly to requested reviews of draft data or other reports, final reports are issued, and the project is closed out.

Revisions requested after the final report is issued are provided for an additional fee.

Facility Condition Assessment

The FCA process is delivered using a disciplined and proven set of processes and tools to ensure that accurate data is collected and populated in the software to provide deep insights into your capital planning needs and to enable you to develop impactful capital plans.

- Introduction to the Project Team and Project Kick-off Meeting
- Set Goals
- Confirm Scope and Deliverables
- Management Plan

Data Collection

The Gordian Project Manager communicates with your facility and maintenance managers and staff members using email and teleconferencing to facilitate the collection of essential information required by our assessment teams.

This data typically includes additional asset information (e.g., floor plans, drawings, previous studies, recent capital improvements made and planned for, etc.).

To facilitate information flow, Gordian hosts an information repository using SharePoint that provides information important to the project's ongoing progress.

System Configuration

System configuration is necessary to prepare for the Assessment phase. In the Gordian Cloud Platform, we create a virtual facilities inventory by leveraging technology to model the facilities accurately. This baseline is created for facilities based on the level of detail required.

For the FCA, data is configured up to Unifomat Level 5.

This baseline is built using experience from 20 years of facilities information within the Gordian database and leverages over 50,000 buildings as reference points to build the framework. Costs and life cycles for the assessment are linked directly to the RSMeans dataset, which is updated annually to ensure your cost data never becomes outdated.

Assessment Phase

The Assessment Phase is the fundamental step in building your assessment dataset in which Gordian professionals account for your unique facility characteristics.

On-Site Assessment Using Mobile Asset Capture

During an FCA, Gordian sends one or more teams to your facilities to perform the assessments. On the first day of the field visit, Gordian will organize a meeting with your team members who will be involved with the field assessment phases of the project to kick off the on-site survey work. This meeting enables your staff to meet the Gordian assessment team and understand the project schedule. It also includes a discussion of the site visit's logistics, such as accessing all elements of the facility, and other practical information important to undertaking the physical assessment. Gordian ensures that all functional teams understand project objectives, conditions, and goals. We request that Gordian's field assessment team(s) be granted prompt and full access to the subject properties, including supervised entry to all relevant areas and safe access to subject properties—including roof unless sloped—to facilitate a thorough and efficient assessment process.

Assets Included in an On-Site Assessment

Information gathered during the assessment process and stored in the Gordian Cloud Platform is organized by Unifomat code. The ASTM International Unifomat II Classification for Building Elements defines a standard classification for building elements and related site

*

work. Each Uniformat II Category performs a given function, regardless of the design specification, construction method, or materials used. Using Uniformat II to classify systems and assets provides a consistent reference for the description, economic analysis, and management of building components during all phases of their life cycles. The Uniformat II Classification for Buildings Elements is made up of four levels:

- Level 1 is a general grouping of major elements.
- Level 2 is group elements (e.g., roofing, conveying, plumbing).
- Level 3 contains individual elements (e.g., basement walls, partitions, floor finishes).
- Level 4 contains sub-elements of individual elements (e.g., specific equipment, door frames, roof canopies).

All evaluated assets are assigned to specific Uniformat categories using the levels described previously.

The specific list of assets to be assessed—by Uniformat category—is established during the Project Initiation phase.

Visual Inspection

Gordian's team visually inspects all the facilities included in the project's scope to identify deficient conditions and assess the remaining lifecycle of designated assets documented by digital photographs.

The inspection of the facilities' interior space includes all mechanical and electrical rooms, all public spaces, and a representative sampling of similar room types (e.g., offices). For example, "it is not the intent to assess every balcony, window, utility closet, every square foot of roofing, etc. Only representative observations of such areas are to be surveyed" as per ASTM Document E-2018-24, Standard Guide for Property Condition Assessments.

The inspections of the facility's exterior space include an approximate ten-foot perimeter around the facility and the areas adjacent to and/or attached to the facility that are inherent to the facility's use, such as ramps, stairs, entryways, and exterior wall-mounted lighting. Additional site/property level assessments are outside this scope of work unless specifically included.

Gordian captures digital photos during the assessment process and associates them with facilities and assets to visually illustrate existing conditions.

Data Development Phase

As we transition into the Data Development Phase, Gordian processes and refines the data collected on-site, ensuring that each facility's profile is accurately documented, costed, and analyzed for effective lifecycle management on the Gordian Cloud Platform.

Please see the Data Processing section and Data Qualification and Acceptance section under Modeled Assessment for more details.

Data Quality Control and Assurance
Our Center of Excellence (COE) team is committed to unparalleled quality and drives our organization-wide pledge to maintain superior standards across every stage of our assessment process. It starts with deploying experienced assessment professionals, certified through Gordian's rigorous Facilities/Infrastructure Certification Program.

Our commitment to excellence is embodied in our Quality Assurance/Quality Control processes, where we have woven AI-driven Natural Language Processing into our frameworks. This innovative approach enables our COE team to operate with heightened independence from our assessors, introducing an advanced layer of data verification. This ensures the highest standards of accuracy and reliability in our outputs.

Data Qualification and Acceptance
Following our internal review, Gordian conducts a data qualification meeting with your team to review a summary of identified needs to help guide the feedback process and make changes as requested. If desired, detailed data can be provided for independent customer review. While customer input is not required, it is valued to ensure the assessment's precision and depth. Any feedback provided is incorporated into the final deliverables.

Deliverables Phase
Please see the Deliverables Phase section under Modeled Assessment for more details.

Introduction and Orientation to the Gordian Cloud Platform
Please see the Introduction and Orientation to the Gordian Cloud Platform section under Modeled Assessment for more details.

Project Completion
The project is considered complete when final reports have been delivered. If your organization is unable to respond promptly to requested reviews of draft data or other reports, final reports are issued, and the project is closed out. Revisions requested after the final report is issued are provided for an additional fee.

Facility Condition Assessment+
The FCA+ process is delivered using a disciplined and proven set of processes and tools to ensure that accurate data is collected and populated in the software to provide deep insights into your capital planning needs and to enable you to develop impactful capital plans.

Project Initiation Phase
The Project Initiation Phase of the assessment is the foundational stage where the groundwork for the entire

- assessment process is established.
- Introduction to the Project Team and Project Kick-off Meeting
 - Set Goals
 - Confirm Scope and Deliverables
 - Management Plan

Data Collection

The Gordian Project Manager communicates with your facility and maintenance managers and staff members using email and teleconferencing to facilitate the collection of essential information required by our assessment teams. This data typically includes additional asset information (e.g., floor plans, drawings, previous studies, recent capital improvements made and planned for, etc.).

To facilitate information flow, Gordian hosts an information repository using SharePoint that provides information important to the project's ongoing progress.

System Configuration

System configuration is necessary to prepare for the Assessment phase. In the Gordian Cloud Platform, we create a virtual facilities inventory by leveraging technology to model the facilities accurately. This baseline is created for facilities based on the level of detail required.

For the FCA+ service, data is configured up to Unifomat Level 5. This baseline is built using experience from 20 years of facilities information within the Gordian database and leverages over 50,000 buildings as reference points to build the framework. Costs and life cycles for the assessment are linked directly to the RSMeans dataset, which is updated annually to ensure your cost data never becomes outdated.

Assessment Phase

The Assessment Phase is the fundamental step in building your assessment dataset in which Gordian professionals account for your unique facility characteristics.

On-Site Assessment Using Mobile Asset Capture

Please see the Mobile Asset Capture description section under Facility Condition Assessment.

Assets Included in an On-Site Assessment

Please see the Assets Included in an On-Site Assessment section under Facility Condition Assessment.

Visual Inspection

Please see the Visual Inspection section under Facility Condition Assessment.

Requirements

The Gordian team provides experienced professionals to document observed deficiencies as they relate to accessibility, life safety, building codes and standards, and local regulations during the evaluation of asset condition. In addition, the team identifies projects where an alternative action to full asset replacement is feasible to help extend

or preserve Remaining Useful Life. FCA+ also accounts for factors such as environmental exposure, quality of installation, material suitability, and the rigor of the preventive maintenance program. Recognizing that systems can either surpass or fall short of their average useful lifespan expectations, our assessors judiciously factor these variables into their final evaluations.

- Findings Limitations. Non-compliance findings are limited due to sampling of space and limited measurements and therefore should not be considered an exhaustive list of all non-compliance for a given property.
- New Construction. Non-compliance may be noted concerning codes for new construction, without implying non-conformance with older regulations in force at the time of original construction.
- Accessibility. Apparent accessibility compliance issues are noted as observed during the visual inspection of an asset. A detailed study of the requirements of accessibility—such as would be provided by a specialized Americans with Disabilities Act (ADA) compliance consultant—is beyond the scope of this proposal. However, Gordian can provide this level of service if required, for an additional fee.

Data Development Phase

As we transition into the Data Development Phase, Gordian processes and refines the data collected on-site, ensuring that each facility's profile is accurately documented, costed, and analyzed for effective lifecycle management on the Gordian Cloud Platform.

Data Processing

Once the on-site work is complete and data is synced to the Gordian Cloud Platform, the assessment team reviews their findings and documents each facility, including updates on assets, requirements, costing, estimated life, and reporting. All data is stored on the Gordian Cloud Platform.

We collaborate with knowledgeable staff to uncover hidden issues. If your team can participate, we conduct interviews to capture their expertise, ensuring all known issues are addressed and initial observations are clarified. These discussions help align operational goals and establish accurate repair priorities and timelines, fostering ownership and buy-in across your organization.

Facilities are broken down into assets, cataloging the current inventory, such as the type and quantity of roofing or ceiling materials. For each asset, we determine two key pieces of information:

- Expected Useful Life. This is an estimation of how long an asset should last under normal conditions,

based on industry standards and manufacturer guidelines (e.g., how long should this roof last?).

- Remaining Useful Life. Based on the visual inspection, we assess how much longer the asset can continue to function effectively (e.g., how long can we expect the roof to last?).

Next, Gordian determines the:

- Asset Replacement Cost. The cost of replacing the asset with current equivalent technology, using RSMeans data for up-to-date pricing on materials and labor.
- Facility Replacement Value. We calculate replacement values using our Gordian Cloud Platform software and apply a \$/GSF cost estimate made up of a variety of different variables, including:
 - The size of the facility in Gross Square Feet (GSF)
 - Technical complexity of the facility according to the Gordian tech rating scale
 - Regional construction cost indexes
 - Function of the facility
- Requirement Cost. The estimated remedial action cost. Requirements are material deficiencies (e.g. unsafe, broken/damaged, can no longer perform the intended function, does not conform to current codes, or maybe an improvement to the facility, such as an energy conservation project). The survey typically includes capital needs rather than operational, such as major repairs to the air handling unit vs. changing a fan belt. Capital vs. operational expenses are often set by a dollar minimum threshold—we typically set this amount at \$3,000. The threshold is agreed upon at the beginning of the project. Life Safety deficiencies, if determined, are identified regardless of the dollar threshold amount. Deficiencies that may be remedied with routine maintenance, minor repair, or normal operating maintenance are excluded unless it is found to be systemic across the entire facility.

Requirements are identified for the entire facility—not by individual room or component unless specified otherwise.

Testing, measuring, or preparing calculations for any asset or component to determine adequacy, capacity, or compliance with any standard is outside the scope of assessment.

Facilities and Asset Descriptions
A narrative summary of each assessed facility and its assets is documented to support field findings and adjustments. This information is useful for having key information about a facility including finishes and infrastructure. For all assets—where the condition is rated poor—and all requirements, a narrative describes the needs in detail.

Data Quality Control and Assurance
 Our Center of Excellence (COE) team is dedicated to maintaining superior standards throughout our assessment process. We deploy experienced professionals certified through Gordian's Facilities/Infrastructure Certification Program. Our Quality Assurance/Quality Control processes incorporate AI-driven Natural Language Processing, allowing our COE team to operate independently from assessors and ensuring the highest accuracy and reliability in our outputs.

Data Qualification and Acceptance
 Following our internal review, Gordian conducts a data qualification meeting with your team to review a summary of identified needs to help guide the feedback process and make changes as requested. If desired, detailed data can be provided for independent customer review. While customer input is not required, it is valued to ensure the assessment's precision and depth. Any feedback provided is incorporated into the final deliverables.

Deliverables Phase

Refer to the Deliverables Phase description in the Modeled Assessment scope above. In addition, in FCA+, the customer receives a final report package.

Final Report Package Delivery

This final report details Gordian's findings including requirement and renewal costs and timelines. These elements are essential for creating various funding scenarios, allowing for a side-by-side evaluation of potential investment strategies. We deliver final reports electronically in PDF.

The Final Report Package includes the following elements:

- **Executive Summary.** This report provides high-level information to offer an overview of the facilities together as a portfolio. This includes:
 - Overall Asset Value.
 - Overall Facility Condition Index (FCI).
 - Overall FCI cost—deferred maintenance—values.
 - **Assessment Methodology.** This report covers the assessment process itself and includes:
 - A recap of data provided by your organization.
 - An overview of the assessment process.
 - Terms and definitions.
 - **Appendix Report Data.** This element includes major findings from the assessment process, which include:
 - Requirement summaries and cross-tabular reports.
 - Detailed requirement reports—including asset summary and requirement descriptions.
 - Terms and definitions.
- The proposed standard final report is a consolidated document encompassing all assessed assets, with individual facilities reports

			<p>available upon request for an additional fee.</p> <p>Introduction and Orientation to the Gordian Cloud Platform</p> <p>To ensure the continued accuracy of the assessment data, Gordian makes our information accessible to you and your team through our online platform, Gordian Cloud. This web-based platform is the central repository for all facilities' needs, strategic tools, and detailed assessment results. Our project team provides an introduction and orientation to this platform for your project team; this continues throughout your partnership with Gordian with our Customer Success team. We also introduce you to your personal Customer Success Manager, who is available to assist you beyond the initial project completion.</p> <p>Project Completion</p> <p>The project is considered complete when final reports have been delivered. If your organization is unable to respond promptly to requested reviews of draft data or other reports, final reports are issued, and the project is closed out. Revisions requested after the final report is issued are provided for an additional fee.</p>
78	Energy, utility, and emissions assessment and planning	<input checked="" type="radio"/> Yes <input type="radio"/> No	<p>Campus Sustainability</p> <p>Gordian's Campus Sustainability solution helps you enhance environmental stewardship, connect sustainability to other campus investments, and communicate plans to various constituencies on campus.</p> <p>Phases of the Campus Sustainability Solution</p> <p>The Campus Sustainability solution is implemented through four phases:</p> <ul style="list-style-type: none"> • Project Initiation Phase • Data Discovery Phase • Data Development and Analysis Phase • Deliverables Phase <p>Each of these phases is described in the following sections:</p> <p>Project Initiation Phase</p> <p>The Project Initiation Phase of Campus Sustainability is the foundational stage where the groundwork for the entire process is established.</p> <p>Introduction to the Project Team and Project Kick-off Meeting</p> <p>Once you have been introduced to your project team, the first step is to discuss the details of the project during the kick-off meeting.</p> <p>Set Goals</p> <p>To kick off the project, your designated Gordian Project Manager sets up a meeting with your organization's key stakeholders for introductions and to confirm the goals and objectives for the project. Understanding what your organization wants to achieve with this project is the key to its success and drives the project effort, ensuring the end</p>

deliverable best meets your expectations and goals.

Confirm Scope and Deliverables
 During the initiation phase, the Gordian Project Manager collaborates with key stakeholders to establish and document the parameters for the project. A scoping meeting is held to discuss and confirm schedules, criteria, and data classifications. Often the goal setting and confirmation of scope and deliverables can be discussed and agreed upon in one meeting.

Management Plan
 The Gordian Project Manager conducts regular progress meetings throughout the phases of the project to maintain open communication. The frequency of progress meetings is determined during the initial engagement phase of the project. A schedule is provided to illustrate the usual phases and milestones of the project, including tasks and durations of your required involvement. The project schedule is maintained by Gordian's Project Manager who oversees each task, communicates at both the project management and team levels, and tracks changes closely.

Project Schedule
 Gordian works with you to determine the most appropriate schedule for site visits and presentations.

- **Data Collection.** Data collection begins with a one-day on-site or web-based meeting.
- **Analysis—QVQ Process.** The data analysis should span approximately three weeks with a web-based or live meeting to follow. Data is qualified.
- **Deliverables.** Deliverables are available approximately one month after on-site data collection, contingent on data collection being complete.

Data Discovery Phase
 During Gordian's Campus Sustainability Solution's Data Discovery Phase, the focus is on rigorous data collection and analysis. The data collection process includes:

- **Preparing.** Before on-site data collection, Gordian schedules a web-based meeting to review data availability, confirm timelines, and set a date for the presentation of findings.
- **Gathering Historical Data.** Gordian gathers five years of data at each institution, including four years of historical data plus the current year, to evaluate trends and ensure future data accuracy.
- **Compiling GHG Inventory.** Gordian utilizes SiMAP to compile Greenhouse Gas (GHG) inventories following the World Resources Institute Greenhouse Gas Protocol, ensuring comparability among institutions and expressing all emissions in carbon dioxide equivalents (MTCDE).
- **Measuring Emissions.** Gordian measures scope 1, scope 2, and

			<p>scope 3 emissions with a commitment to thorough accounting as per Second Nature guidelines, considering full reporting of scope 1 and 2 emissions as mandatory and scope 3 emissions for commuting and directly financed air travel as a minimum requirement.</p> <p>Scope 1. Primarily composed of fossil fuel combustion for heating, cooling, and other power generation. Also, fertilizer, campus vehicle fleets, refrigerant releases, and research livestock.</p> <p>Scope 2. Indirect emissions from the generation of power or other end-use utilities imported to the institution.</p> <p>Scope 3. Other indirect emissions that result from the institution's activities but are not owned or controlled by the institution. This can be difficult to measure and includes commuting, air travel, waste disposal, paper consumption, and wastewater processing.</p> <p>Base Data Collected The base data that Gordian collects is provided below.</p> <p>Utility and Cost Consumption</p> <ul style="list-style-type: none"> Collect utility information by fuel or energy type Determine the source of electric purchases <p>Generation Review</p> <ul style="list-style-type: none"> Overview of utility systems and efficiencies of generation—if applicable <p>Space Profile Review</p> <ul style="list-style-type: none"> Identify the square footage to be analyzed. <p>Community Population Review</p> <ul style="list-style-type: none"> Standardize population data (FTE): Collect data for faculty, staff, and students. <p>Agriculture</p> <ul style="list-style-type: none"> Headcounts of livestock on campus—if applicable Fertilizer consumption—pounds and nitrogen content <p>Commuting</p> <ul style="list-style-type: none"> Review existing commuting analyses Execute web-based Community Assessment Collect zip codes for faculty, staff, and student commuters Identify the percentage of residential faculty, staff, and students <p>Directly Financed Travel</p> <ul style="list-style-type: none"> Collect distance or cost of directly financed travel Determine the mode of directly financed travel <p>Fleet Vehicles</p> <ul style="list-style-type: none"> Fuel use by type for institution-owned/leased vehicles <p>Waste Disposal and Recycling</p> <ul style="list-style-type: none"> Tons of waste disposed
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- Method of disposal—landfill/incineration
- Tons of construction waste
- Tons of recycled materials
- Tons of composted waste

Refrigerant Use

- Volumes of refrigerants used by type

Water/Sewer

- Water and sewer use in gallons
- Separate irrigation and utility systems—if applicable

“Green” Construction

- Square footage of LEED-certified buildings

Data Development and Analysis Phase

As Gordian transitions to the Data Development and Analysis Phase, we assess your current situation and determine how well-positioned you are to address exposures. This phase includes:

- Converting and Validating Data. Gordian staff collects and validates base data from each institution, avoiding reliance on self-reported surveys, to transform campus data into usable information and actionable knowledge.

- Applying the QVQ Process. Gordian implements our QVQ (Quantify, Verify, Qualify) Process to establish confidence and credibility in facilities and sustainability data, enabling consistent and reliable comparisons across institutions. Our QVQ Process ensures the highest level of quality and consistency in our data collection.

Gordian:

- Collects data onsite
- Uses standard templates to gather valid comparative information
- Creates a five-year performance trend for all data
- Correlates performance metrics and logical data relationships to establish confidence
- Qualifies the data via presentation to key institutional personnel

Deliverables Phase

During the Deliverables Phase, objective observations from our analysis are shared to empower knowledge-based decisions. This approach helps in crafting data-driven strategies, ensuring that investments are made wisely and with a clear understanding of their expected outcomes.

Our third-party perspective gives us the ability to effectively remove subjectivity and make credible recommendations that speak to the concerns of all stakeholders and help you reach the best outcomes for your institution. Gordian’s success tells us that effective deliverables must be understandable. Therefore, strategic

			<p>and technical information must be integrated to ensure policy initiatives can be easily translated into tactical actions for implementation at all levels of the organization. Gordian provides the following deliverables:</p> <ul style="list-style-type: none"> • PowerPoint presentation of the results delivered either on-site or via webinar. • Gordian Member Portal, which provides full access to all institutional environmental data and the ability to run comparative reports among all Gordian members. <p>Project Completion The project will be considered complete when the presentation has been delivered.</p>
79	Site, safety, and code inspections	<input checked="" type="radio"/> Yes <input type="radio"/> No	<p>ADA Compliance Assessment</p> <p>Gordian conducts an Americans with Disabilities Act (ADA) accessibility assessment per the customer's building list. The Tier II and Tier III assessment services, at the pricing provided, are conducted concurrently with the FCA work, otherwise, additional labor and expense fees are charged as incurred.</p> <ul style="list-style-type: none"> • Tier II Assessment. The Tier II assessment is a streamlined accessibility survey that utilizes representative sampling and targeted measurements in accordance with the Tier II Checklist, following ASTM E2018 and 2010 ADA standards. This survey, being less comprehensive than Tier III, focuses on visual inspections of key areas to spot major accessibility issues. Our methodology includes a complete review of all checklist areas, noting any deficiencies. Strategic measurements are taken to ensure ADA compliance, although not every element is measured exhaustively. • Tier III Assessment. In contrast, the Tier III assessment is an extensive evaluation involving both detailed visual inspections and precise measurements of all accessible spaces to ensure compliance with the 2010 ADA standards. Additionally, where necessary, this assessment includes a comparison with state-specific building codes to ensure full compliance at both the federal and state levels. The Tier III process features an exhaustive checklist, which we customize in partnership with the customer, focusing on any specific concerns or unique areas of interest. This approach guarantees a thorough assessment that aligns with your organization's needs. • The findings of the surveys are entered into the Gordian Cloud database as Work Items under a Category titled "Safety/Code." • Based on the date of construction or installation, Work Items are prioritized as P1 – Correction within one year for buildings built after the ADA came into effect in

			<p>1991.</p> <ul style="list-style-type: none"> • Older facilities that have not been renovated, are prioritized as P4 – Not Time Based with no timetable for correction. • For Accessibility issues that also include a Project, the Investment Criteria are identified as Safety/Code, and the Project Time Frame is updated to Backlog. <p>Survey Areas</p> <p>The surveys include an examination of the following areas:</p> <ul style="list-style-type: none"> • Parking • Exterior Accessible Route (Path-of-Travel) • Building Entrances • Interior Accessible Routes and Amenities • Interior Doors • Elevators • Toilet Rooms • Hospitality Guestrooms <p>Deliverables</p> <p>The following are delivered to the customer:</p> <ul style="list-style-type: none"> • A Tier II or Tier III checklist in Excel format. A view within the Project Schedules for ADA-only work items can be created and exported to Excel. • Tier II Assessment. Work Item lists generated in Gordian Cloud on a floor or building-wide basis to address deficiencies. • Tier III Assessment. Work Item lists generated in Gordian Cloud on a room/area-wide basis—and may be grouped by floor or building-wide basis—to address deficiencies. <p>Out of Scopes Issues</p> <p>The following are out of scope:</p> <ul style="list-style-type: none"> • Design and drawing services. • Engineering calculations to determine if additional ADA capacity is available in parking lots and fire alarm panels.
80	Space utilization and planning	<input checked="" type="radio"/> Yes <input type="radio"/> No	<p>Space Utilization</p> <p>Gordian's Space Utilization solution helps you optimize the use of existing academic spaces to avoid unnecessary costs and provide a foundation for strategic campus growth. This comprehensive solution makes teaching space renewal more manageable and aligns project selection with institutional goals to achieve optimal investment outcomes. Phases of the Space Utilization Solution</p> <p>The Space Utilization solution is implemented through four phases:</p> <ul style="list-style-type: none"> • Project Initiation Phase • Data Discovery Phase • Program Assessment • Deliverables Phase <p>Each of these phases is described in the following sections:</p> <p>Project Initiation Phase</p> <p>The Project Initiation Phase of Space Utilization is the foundational stage where the groundwork for the entire process is established. Introduction to the Project Team and Project Kick-off Meeting</p>

Once you have been introduced to your project team, the first step is to discuss the details of the project during the kick-off meeting.

Set Goals
 To kick off the project, your designated Gordian Project Manager sets up a meeting with your organization's key stakeholders for introductions and to confirm the goals and objectives for the project. Understanding what your organization wants to achieve with this project is the key to its success and drives the project effort, ensuring the end deliverable best meets your expectations and goals.

Confirm Scope and Deliverables
 During the initiation phase, the Gordian Project Manager collaborates with key stakeholders to establish and document the parameters for the project. A scoping meeting is held to discuss and confirm schedules, criteria, and data classifications. Often the goal setting and confirmation of scope and deliverables can be discussed and agreed upon in one meeting.

Management Plan
 The Gordian Project Manager conducts regular progress meetings throughout the phases of the project to maintain open communication. The frequency of progress meetings is determined during the initial engagement phase of the project. A schedule is provided to illustrate the usual phases and milestones of the project, including tasks and durations of your required involvement. The project schedule is maintained by Gordian's Project Manager who oversees each task, communicates at both the project management and team levels, and tracks changes closely.

Data Discovery Phase
 During Gordian's Space Utilization Solution's Data Discovery Phase, the focus is on rigorous data collection and analysis. Core data assembly is a foundational step in our facility analysis process, where we document and quantify the size, function, and age of buildings, as well as the conditions and needs of academic spaces, using a comprehensive database derived from existing resources. The following are documented:

- Building size, function, and age
 Quantify the square footage of each building based on available data. Use existing drawings, floorplans, and other resources to create a database of teaching space size, usage, and assignment.
- Academic space conditions
 Quantify the academic classroom spaces as to size, components, and condition. Quantify the repair, modernization, and life cycle needs within the spaces.

Program Assessment Phase

			<p>Gordian's space utilization program assessment includes:</p> <ul style="list-style-type: none"> • Documenting Current Utilization. Document existing space utilization by room and position (chair) use. <p>Gordian:</p> <p>Identifies the utilization of each room by comparing the schedule of room usage to the available times the room is available to be scheduled.</p> <p>Identifies the position utilization by quantifying the number of people enrolled in the class as compared to the room's capacity.</p> <ul style="list-style-type: none"> • Assessing Classroom Condition. Performs a room-by-room inventory with assessments of current conditions, technology, and configuration. Document the space condition and its successes in supporting the program (mediation, technological integration, seating, physical environment, shading, etc.). This includes documentation of the components in each room, how these components work effectively to support the program, and how these components should be modernized in future capital investment plans. • Reviewing Institutional Scheduling Policy. Complete a detailed review of the available scheduling information for in-scope rooms for four (4) semesters. On every campus, there are idiosyncrasies in programs and between departments that over time fragment space scheduling and utilization. Some of these policies are intentional and some are not. Some of these policies are desirable and logical in support of campus programs and some are not. Gordian defines these issues and helps facilitate a discussion of these policy attributes, potential issues, and options for change. • Conducting Student and Faculty Focus Groups. Meet with key groups on campus to acquire first-hand perspectives on the rooms as they are when being used for teaching and learning. These meetings reveal insights about why certain rooms are more popular than others and indicate desires from those who are in the spaces every day. Gordian: <ul style="list-style-type: none"> Interviews student, faculty, and administrative focus groups to define use profiles and the unidentified use of spaces. We propose four (4) academic focus group discussions. Two (2) each with Faculty and Students to capture first-hand experiences. Documents the first-hand experiences for the space in supporting the program and note desired capabilities. Identifies popular and unpopular characteristics of existing teaching spaces to align future renovation requirements. • Benchmarking. Conduct database comparisons to contextualize current space utilization to better define outcomes that
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reconcile program vision with financial capacity. With over 450 customers across higher education, Gordian has a unique ability to evaluate context by benchmarking space characteristics across similar campuses. No other vendor has this ability at their fingertips. This comparison provides an effective “cross-check” by infusing high-level analysis of space quantity, function, and density. At a minimum, this benchmarking initiative includes:

The mix of campus spaces for campuses of similar student populations and residential mix.

Campus space density—the number of people opening and closing doors compared to peers.

Ground density—buildings per acre.

Building intensity—the number of buildings per million square feet, an indicator of building size and efficiency.

Profile of teaching space room types and class sizes compared to our space utilization database.

- Discovering Options for Improvement. An example of an option for improvement is adaptive reuse strategies. Although not articulated in most requests for services, we have found that these space assessments often suggest the renovation and/or the creation of new space. We have also discovered that campuses can attain a more effective outcome by considering the use of a space for an alternative function. Building a new lab building and converting the old lab building to general-use classrooms is an example of adaptive reuse to alleviate the problem of too few classrooms without having to build two new facilities.

Exclusions—Non-teaching Space and Cost per Square Foot

Gordian’s approach to space utilization considers only the scheduled teaching space such as classrooms, labs, conference rooms, and lecture halls. The services described in this proposal do not include efforts to quantify the demand and utilization of space that is not scheduled, such as libraries, offices, and general use space.

Gordian does not provide a cost-per-square-foot metric when considering the classroom utilization metrics. To get to a cost per square foot for the space, we consider the entire building, and the costs associated as identified through relevant financial, utility logs, and CMMS data via our ROPA (Return on Physical Assets) service.

Deliverables Phase

During the Deliverables Phase, objective observations from our analysis are shared to empower knowledge-based decisions. This approach helps in crafting data-driven strategies, ensuring that investments are made wisely and with a clear

			<p>understanding of their expected outcomes.</p> <p>Our third-party perspective gives us the ability to effectively remove subjectivity and make credible recommendations that speak to the concerns of all stakeholders and help you reach the best outcomes for your institution. Gordian's success tells us that effective deliverables must be understandable. Therefore, strategic and technical information must be integrated to ensure policy initiatives can be easily translated into tactical actions for implementation at all levels of the organization.</p> <p>Objective observations from our analysis are shared to empower knowledge-based decisions. Gordian will conduct a:</p> <ul style="list-style-type: none"> • Data qualification presentation where the accuracy, relevance, and quality of collected data are verified and presented to stakeholders. • Preliminary results presentation that shares initial findings and strategic recommendations with campus/entity leadership. • Executive-level results presentation to deliver a focused, simplified story to an executive or board-level audience. <p>Project Completion The project will be considered complete when the presentation has been delivered.</p>	
81	Geographic information system (GIS) services	<input type="radio"/> Yes <input checked="" type="radio"/> No	Gordian does not offer this service.	*
82	Feasibility, sustainability, and lifecycle assessment	<input checked="" type="radio"/> Yes <input type="radio"/> No	<p>Energy Assessment</p> <p>The Gordian Team employs a meticulous energy assessment process, crafted to ensure our highly skilled and trained staff deliver unparalleled quality outcomes to our customers.</p> <p>The analysis involves:</p> <ul style="list-style-type: none"> • Reviewing the facility's utility bills and current planned direct and indirect energy and utility initiatives • Interviewing facility personnel • Walking through each facility • Identifying, costing, and recommending energy conservation opportunities <p>Phases of the Energy Condition Assessment Process The assessment process is implemented through four phases:</p> <ul style="list-style-type: none"> • Project Initiation • Assessment • Data Development • Deliverables <p>Each of these phases is described in the following sections.</p> <p>Project Initiation Phase Gordian's Project Manager meets with the customer's staff focused on the energy conservation component of the overall assessment.</p> <ul style="list-style-type: none"> • The session reviews current commodity costs, provided by the customer, and typical operating schedules for its facilities and equipment. 	

- As utility prices and operating schedules vary from site to site, site-specific data is collected.
- Gordian benchmarks each building's normalized energy consumption relative to that of similar (peer) buildings using energy consumption data spanning a minimum of 12 consecutive months and up to three consecutive years, as available.

Assessment Phase
 Energy Kickoff Meeting
 At the site, the project kickoff meeting for the energy assessment includes:

- A review of the scope, specifications, and agreed-upon guidelines for the energy assessment by the assessment team, along with the specific customer site staff, to ensure coordinated efforts.
- Collection of asset-specific details concerning energy conservation projects completed, in progress, or planned, as well as information on operational issues that assist in the energy evaluation.
- To achieve the best results, the customer should provide Gordian with documents for analysis such as:
 - The operating schedule for the facility and major mechanical/electrical equipment
 - Occupancy schedule for the facility
 - Equipment / Lighting inventory—if available
 - Monthly utility consumption and costs for at least three years are preferred
 - Floor plans (including ME and EE drawings and diagrams)
 - Commissioning / Re or Retro-Commissioning Reports
 - Building Management System (BMS) reports
 - Balancing Reports, where available
 - Past Energy Audits
 - Current Energy Initiatives

Facility Walk Through
 During the energy assessment survey:

- The Gordian team walks through the facility to become familiar with its construction, equipment, operation, and maintenance in terms of energy.
- Building systems included in the condition assessment are reviewed for energy opportunities, eliminating any duplication of effort.
- The energy assessment is visual and does not include equipment testing, monitoring, or metering. The following systems are analyzed:
 - Lighting and controls
 - HVAC systems and controls
 - Controls and instrumentation
 - Heat-generating systems
 - Cooling generating systems
 - Terminal and Package Units
 - Building envelope
 - Domestic water heating
 - Plumbing Fixtures as related to Hot water use

Data Development Phase

			<p>Enter Energy Data The Gordian team enters the standard assessment as well as the energy data into our software. This includes:</p> <ul style="list-style-type: none"> • Utility data • Alternate energy actions to conventional FCA deficiencies • Stand-alone energy initiatives • Simple payback (SP) and return on investment (ROI) calculations <p>The Gordian team provides a brief description of the energy conservation measures as well as the anticipated labor and material installation costs. In addition, benchmarking of energy data helps indicate where to set targets for improvement.</p> <p>Perform Energy and Payback Analysis Conservation opportunities are evaluated based on cost, savings, payback period (SP), return on investment (ROI), and any other decision criteria agreed upon with the customer.</p> <p>Gordian identifies Low-Cost and No-Cost Energy Efficiency Measures (EEM) Recommendations that may include the following:</p> <ol style="list-style-type: none"> 1. Lighting measures <ul style="list-style-type: none"> • Retrofit / replace existing lighting systems: interior, parking structure, or outdoor. • Motion sensors and other lighting control systems. • Exit signs replacement. 2. Replacing standard-efficiency electric motors with premium-efficiency motors. 3. Install variable frequency drives on equipment such as: <ul style="list-style-type: none"> • Chillers • Cooling towers • Pumps • Air handlers 4. Recommendations for Building Automation Systems (BAS), Energy Management Systems (EMS), or other optimization software 5. Upgrade cooling equipment <ul style="list-style-type: none"> • Centrifugal vs. reciprocating chillers • Cooling towers • Air-cooled package units • Conversion of DX to chilled water AHUs 6. Convert chilled water constant-flow to variable-flow system 7. Boiler plants: <ul style="list-style-type: none"> • High-efficiency boilers • Condensing boilers • Dual fuel boilers (to get an interruptible rate from the utility company) 8. Domestic hot water 9. Heat recovery systems 10. Recommendations for retro-commissioning and ongoing commissioning 11. Windows—tinting or external shading 12. Roof insulation or "cool" roof products <p>Deliverables Phase Prepare Final Energy Reports</p>
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Gordian provides the customer with a report that includes findings, recommendations, budgetary pricing for energy conservation measures, and simple payback and ROI calculations. A draft progress report is provided, as well as a final report including all the customer comments and feedback.

Report Deliverables

The Energy Assessment provides:

- An evaluation of the condition of building(s) in terms of the current energy efficiency and usage. This includes an EUI analysis (Energy Usage Intensity in kBtu/SF/Yr) showing the most recent 12 months of energy data and the effect of recommended projects.
- Recommendations for alternative actions to conventional corrective actions identified in the facility condition assessment for energy conservation initiatives, where appropriate, with construction cost estimates.
- Identification of new energy conservation measures, with construction cost estimates.
- Cost analysis, including simple payback and ROI, where applicable.
- A report itemizing all energy opportunities and supporting information by building and rolling up to higher levels of the customer portfolio.

If the energy assessment is conducted at the same time as the FCA, capital spending values can be forecast both with and without, the projected implementation of energy savings measures.

Green Building Assessment

The Green Building Assessment (GBA) aims to provide the customer with critical insights into its current sustainability practices, laying the groundwork for a comprehensive sustainability plan. Gordian collaborates with the customer to define essential performance indicators, such as Energy Use Intensity (EUI), Water Use Intensity (WUI), and Energy Star ratings, to benchmark assets and establish targeted goals for improvement. The GBA focuses on five key sustainability domains and is designed to dovetail with existing Facilities Condition Assessment data serving as a pivotal factor in budgetary decisions and long-term capital planning, ensuring that sustainability is a core consideration in the customer's strategic development.

The customer will recognize the following benefits as a result of the GBA:

- Continuity with your overall sustainable buildings plan.
- An added dimension of sustainability to your budget prioritization.
- Tracking key performance indicators (KPIs) for reporting and

		<p>comparison purposes.</p> <p>Phases of the Green Building Assessment Process</p> <p>The assessment process is implemented through four phases:</p> <ul style="list-style-type: none"> • Project Initiation • Assessment • Data Development • Deliverables <p>Each of these phases is described in the following sections.</p> <p>Project Initiation Phase</p> <p>As part of the Green Building pre-assessment, Gordian:</p> <ul style="list-style-type: none"> • Collects baseline asset data from the customer to set performance baselines and support energy and water performance analyses. • Evaluates policies and procedures in place or being developed that are related to sustainability. • Conducts briefings with the plant maintenance staff to ascertain information specific to the performance of systems at each asset and sustainable measures already being practiced or planned. • Uses performance baselines to support LEED V4 EB Operations & Maintenance. This data will be used to: <ul style="list-style-type: none"> Establish performance baselines by asset for energy and water use—where data is available. Utilize existing baselines if they have already been established. Evaluate current usage patterns. <p>Assessment Phase</p> <p>The Green Building Assessment will visually inspect all facilities and identify opportunities for sustainability improvements consistent with LEED V4 EB Operations & Maintenance.</p> <p>The assessment team:</p> <ul style="list-style-type: none"> • Documents any observed requirements by taking digital photographs during the survey. • Identifies the project assets' current conditions including recommended corrective actions and sustainable alternatives. • Evaluate and compare green actions with standard recommendations and identify deferred maintenance, systems renewals, and green upgrades that provide economic, environmental, and social benefits. • Based on the field survey, establish a whole building performance baseline of the project assets' existing conditions with a LEED V4 EB Operations & Maintenance evaluation. This evaluation applies a sustainability scorecard based on the most current LEED V4 EB Operations & Maintenance definitions. Based on the rating system, the scorecard compares the current state of sustainability with the future potential for high-performance standards. <p>Data Development Phase</p> <p>Data Integration</p>
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In addition to the data already supplied by the customer for the facility condition assessment, other useful data would include:

- Energy audits and/or water conservation studies.
- Specific design standards and specifications that relate to sustainability.
- Policies or programs related to sustainable operations.
- Carbon footprint or emissions studies.

Documentation and Use of Data Requirements

The Gordian Cloud capital planning software incorporates a sustainability feature at the requirement level, where assessors can indicate the presence of an eco-friendly alternative through a dedicated checkbox. This enables users to easily identify requirements with 'green' solutions. Each requirement flagged for sustainability is thoroughly categorized by detailed descriptions, functional categories, action priorities, associated primary building systems, and sustainability categories based on the LEED V4 EB Operations & Maintenance standards. This multifaceted classification system enhances the software's querying capabilities, allowing for in-depth analysis and strategic planning. Users can, for example, filter for all high-priority HVAC requirements with identified energy-saving measures or building integrity issues with sustainable site solutions, as well as pinpoint all actions that contribute to water conservation. This level of detail empowers users to make data-driven decisions that align with their sustainability objectives and operational priorities.

Priority

The priorities used will be consistent with the FCA definitions. The priority designates the time—in which year—the inspector recommends the requirement be addressed.

Category

Categories are used to classify the cause or reason for the requirement. Green requirements use the same categories as conventional requirements.

Corrective Actions

Our assessment team will provide corrective action for each identified requirement, complete with a construction estimate derived from the RSMeans Construction and Facilities Maintenance and Repair Costs data within the Gordian Cloud platform. Recognizing the need for flexibility, we also accommodate non-RSMeans estimates when they are more appropriate for specific scenarios. To ensure accuracy and relevance, all cost estimates and the cost estimating database are updated annually for clients using active Gordian Cloud sites.

Designate Sustainability Categories

Our assessment team is skilled at uncovering sustainability opportunities and will document these findings as specific requirements in Gordian Cloud, adhering to the six critical areas outlined by the LEED V4 EB Operations & Maintenance rating system. This system is a benchmark for building owners and operators to gauge and enhance their building's performance, targeting operational efficiency and environmental stewardship. It covers comprehensive maintenance strategies, including sustainable cleaning practices, waste management, and system improvements.

By conducting this holistic performance evaluation, we establish a condition and operational baseline for the customer's facilities, enabling the tracking of improvements over time. CLIENT can leverage the insights from our Green Building assessment to pursue LEED certification, reduce greenhouse gas emissions, implement energy-saving initiatives, or comply with other environmental mandates.

The LEED V4 EB Operations & Maintenance sustainability categories address:

- Location and Transportation.

Initiatives that pertain to site location and transportation to and from the site. While a transportation survey is not conducted as part of the GBA, observations will be made on the potential for reduction of automobile use and alternative transportation improvements.

- Energy and Atmosphere.

Initiatives that affect and improve energy efficiency and have potential cost savings will be identified. The assessment team evaluates the condition and performance of building systems that potentially affect energy efficiency. This includes electrical and mechanical systems, the integrity of the building envelope, including roofing and windows, as well as making recommendations that can reduce operating and utility consumption costs, decrease greenhouse gas emissions, and have the potential for renewable energy generation. Requirements might include:

- Lighting upgrades and controls
- Building automation system upgrades

- Variable frequency drives on motors

- HVAC equipment upgrades
- Replacement of windows with energy-efficient, solar-treated systems
- Roofing upgrades

- Water Efficiency. Upgrades and improvements will be recommended which result in water conservation for both indoor and outdoor applications and the potential for cost savings.

The assessment team examines water use practices to identify

			<p>opportunities to increase efficiency, reduce waste, and enhance water conservation. Examples include:</p> <ul style="list-style-type: none"> Low-flow or no-flow plumbing fixtures <ul style="list-style-type: none"> Aerators on faucets Grey water collection systems Rainwater collections systems Adaptive landscaping with low water requirements • Indoor Environmental Quality. Conditions that affect indoor air quality, pollution control, and occupant comfort will be identified. The assessment team evaluates the condition of equipment and controls that affect thermal comfort and ventilation, including exhaust and air quality monitoring systems and requirements for air filters and indoor pollution control systems. Opportunities for utilizing natural daylighting and outdoor views to enhance indoor environmental quality are also evaluated. Requirements typically address: <ul style="list-style-type: none"> Low VOC (volatile organic compounds) adhesives in carpets, wall coverings, paints, etc. Adequate thermostat controls Increased natural lighting where appropriate Filter changes during renovation and construction • Materials and Resources. Our green building assessment examines CLIENT's current practices and policies related to materials and resources, focusing on sustainable procurement, waste reduction, and the use of eco-friendly materials. We advocate for alternatives to traditional materials, such as those with recycled or bio-based content, or those with a lower environmental impact throughout their lifecycle. Our evaluation scrutinizes existing operations, maintenance, and construction practices, pinpointing avenues to enhance environmental safety, including eco-conscious cleaning and waste management. We propose strategies and materials that not only support recycling and reuse but also favor products that are sustainably produced and transported, thereby contributing to the customers' sustainability goals and operational efficiency. Examples include: <ul style="list-style-type: none"> Carpet tiles with recycled content Wood products from sustainable sources Alternative flooring from renewable resources, such as linoleum Recycled laminate partitions for restroom renovations • Sustainable Sites. Our green building assessment identifies requirements that pave the way for significant emissions reduction and improvements in the site environment surrounding the asset, leading to better water conservation and energy efficiency. We pinpoint strategies that foster a sustainable site ecosystem, such as soil conservation, native
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habitat-supporting landscaping, innovative transportation solutions for lower emissions, and smart exterior lighting controls. Additionally, we assess the environmental impact of the site, focusing on stormwater management and mitigating heat accumulation on roofs, walkways, and parking areas. Potential requirements to achieve these goals can include:

- Stormwater catchment and reuse in landscape irrigation
- Erosion control and site management
- Exterior building maintenance
- Heat island reduction for paved surfaces and roofs

Use LEED-EB® O&M Scorecard
 The LEED V4 EB Operations & Maintenance scorecard will identify whether prerequisites and credits are either:

- Likely to be obtained
- Questionable whether or not they can be obtained
- Unlikely to be obtained

Our assessment will include a summary report detailing potential performance levels and the corresponding achievable LEED rating points. This report will empower the customer with the strategic insight needed to prioritize actions and requirements that are most effective in elevating their facility's sustainability performance. Utilizing the LEED scorecard as a benchmarking tool, the customer will be able to track and measure their progress over time, ensuring continuous improvement and goal attainment in their green building initiatives.

Set Improvement Targets
 The Green Building Assessment is designed to support the customer in achieving your targets for reducing annual non-renewable energy costs. By setting clear energy use reduction goals or assisting in defining attainable targets, the assessment provides a roadmap for energy and water conservation initiatives, as well as strategies for significant carbon emission reduction. This approach identifies cost-saving opportunities and aligns with the customer's commitment to environmental stewardship and sustainability.

Employ Financial Metrics
 Financial metrics will be used to:

- Compare the cost of conventional facility upgrades with green alternatives and identify gaps to achieve more sustainable standards.
- Help the customer to identify all energy and water savings activities and evaluate the most favorable to the least aggressive paybacks on initial investment costs.
- Target both relatively low-cost and low-impact initiatives that can deliver short-term paybacks and provide tangible improvements to the quality of the work environment.

			<p>Green actions identified for short-term implementation can be easily sequenced with ongoing maintenance programs and scheduled capital improvement projects with minimal disruption to occupants and business operations.</p> <ul style="list-style-type: none"> Identify long-term initiatives with wide-ranging impacts and more extended paybacks. Green actions with longer-term implementation in view are more appropriate for buildings where a significant renovation is being planned, whether it is a single floor level, wing, or the entire building, or where extended occupancy or change of use is envisioned. <p>Deliverables Phase</p> <p>The Green Building assessment will provide:</p> <ul style="list-style-type: none"> Recommendations for alternative sustainable actions to conventional corrective actions identified in the facility condition assessment with construction cost estimates. Identification of new requirements with sustainable actions and cost estimates. Cost analysis, including cost comparison and gap analysis. Simple payback analysis by asset where applicable. Energy and water performance baseline and current use reports and trends based on data provided by the customer for each project asset. Carbon Emissions reduction potential, based on energy conservation measures identified. FCI (Facility Condition Index) and EUI (Energy Utilization Intensity) comparison using a scatter plot report. Evaluation of the state of sustainability of the project asset with LEED V4 EB Operations & Maintenance standards using a scorecard. The scorecard will provide an evaluation of the potential to achieve a particular level within the rating.
83	Asset, capital, and deferred maintenance planning and asset classification	<input checked="" type="radio"/> Yes <input type="radio"/> No	<p>Equipment Inventory and Asset Tagging</p> <p>Gordian performs the inventory assessment of fixed, visibly accessible equipment by capturing information about the pieces of equipment for later upload to the customer's Computer Maintenance Management System (CMMS). Each piece of equipment is tagged with a unique bar code that serves as the unique identifier for each inventory asset. Gordian works with the customer on asset naming conventions and ensures all required data fields and user-defined fields for assets are captured in the proper format for loading into the CMMS. For the inventory piece of this project, Gordian suggests the recording of the following information for each piece of equipment where it may be obtained:</p> <ul style="list-style-type: none"> Manufacturer Model Number Serial Number

- Capacity; Rating; Service Size; Operating Limits; Refrigerant Type; and/or other primary operating data/specifications as noted on equipment tags, appropriate to the type of equipment
- Location of the equipment—building, floor, room—using posted room numbers, or numbers provided on floor plans
- Date placed in service (if available)
- Inventory tag number (a durable weather-resistant bar-coded tag directly attached to the equipment)
- Equipment Condition (Failed, Poor, Average, Good, New)

The suggested scope and associated fee are designed for a data collector to be able to conduct the inventory effort independent of any additional research such as reviewing customer files for purchase or warranty information. Equipment that is located within areas determined as confined spaces, or otherwise unsafe locations for our assessors, that may not be accessed during the field assessment is not visibly observed but is recorded based on information provided by the customer via technical drawings and maintenance staff input. Gordian can capture more information about each piece of equipment if requested before the commencement of the inventory work. The following is an example of major equipment inventoried during this phase of the project.

- Boilers
- Water storage tanks
- Energy management systems (Main Panel)
- Chillers
- Heat exchangers
- Fire alarm systems (Main and Auxiliary Panels)
- Condensing units
- Building electrical service entrances, transformers, panels and switchgear
- Fire suppression systems (wet, dry, gas, and chemical)
- Air handling units, fan coil units, and other unit ventilators
- Generators
- Wet sprinkler system - main service supply only (Pump, Back-flow Preventer)
- Dry sprinklers - main service supply only
- Pumps, 5hp and above
- Air compressors
- Packaged rooftop units
- Motor control centers
- Automatic (Chemical/Gas) fire suppression
- Variable speed drives
- Cooling towers
- Building distribution panels, lighting panels, power panels
- Return air fans, roof fans, and exhaust fans (excluding small in-line duct fans)
- Unit air conditioners (excluding

			<p>window units)</p> <ul style="list-style-type: none"> • Building Utility meters • Hot water heaters • Building control systems (Main Panel) • Elevator equipment, pumps, motors, control <p>Exclusions to the Gordian proposed major equipment inventory service include the following equipment that is generally inaccessible for visual observation, too small to individually locate and inventory, or typically not required to perform maintenance on but rather run to failure then replace:</p> <ul style="list-style-type: none"> • Individual VAV boxes, fan-coil units & reheat coils • HVAC control valves and actuators • Individual HVAC sensors. • Fire alarm signal devices including pull stations, heat & smoke detectors, horn/strobes • Circulation pumps less than 5hp • Any similar terminal devices on distribution systems. • Individual electrical power distribution panels downstream of main panels for power, lighting, and emergency circuits on each floor level. (the team tags items in each main electrical panel room on each floor level) <p>If the customer wants Gordian to perform an equipment inventory of the above list of excluded equipment, Gordian works with the customer to negotiate an additional fee.</p>
84	Benchmarking services and quality assurance	<input checked="" type="radio"/> Yes <input type="radio"/> No	<p>Return of Physical Assets (ROPA)</p> <p>Our proprietary ROPA framework enhances collaboration between business officers and facilities managers by establishing a common language for facilities issues and aligning priorities. This shared foundation enables both parties to effectively communicate a unified vision for the institution. It facilitates clear, institution-wide communication and action planning, leading to well-defined outcomes:</p> <p>Situational Outcomes</p> <ul style="list-style-type: none"> • Protection against cuts • Optimization of facilities investments • Engagement of your Board of Trustees • Charting a course for growth • Learning from your peers <p>Foundational Outcomes</p> <ul style="list-style-type: none"> • Establishment of proven benchmarking processes • Creation of common ground between facilities and finance leaders • Verification of data accuracy and providing context • Education of key stakeholders <p>Phases of the ROPA Solution</p> <p>The ROPA process is implemented through four phases:</p> <ul style="list-style-type: none"> • Project Initiation Phase • Data Discovery Phase • Data Development and Analysis

			<p>Phase</p> <ul style="list-style-type: none">• Performance Measurement and Optimization Phase• Deliverables Phase <p>Each of these phases is described in the following sections:</p> <p>Project Initiation Phase The Project Initiation Phase of ROPA is the foundational stage where the groundwork for the entire process is established.</p> <p>Introduction to the Project Team and Project Kick-off Meeting Once you have been introduced to your project team, the first step is to discuss the details of the project during the kick-off meeting.</p> <p>Set Goals To kick off the project, your designated Gordian Project Manager sets up a meeting with your organization's key stakeholders for introductions and to confirm the goals and objectives for the project. Understanding what your organization wants to achieve with this project is the key to its success and drives the project effort, ensuring the end deliverable best meets your expectations and goals.</p> <p>Confirm Scope and Deliverables During the initiation phase, the Gordian Project Manager collaborates with key stakeholders to establish and document the parameters for project. A scoping meeting is held to discuss and confirm schedules, criteria, and data classifications. Often the goal setting and confirmation of scope and deliverables can be discussed and agreed upon in one meeting.</p> <p>Management Plan The Gordian Project Manager conducts regular progress meetings throughout the phases of the project to maintain open communication. The frequency of progress meetings is determined during the initial engagement phase of the project. A schedule is provided to illustrate the usual phases and milestones of the project, including tasks and durations of your required involvement. The project schedule is maintained by Gordian's Project Manager who oversees each task, communicates at both the project management and team levels, and tracks changes closely.</p> <p>Data Discovery Phase During the Data Discovery Phase, Gordian collects a holistic set of finance, facilities, and infrastructure data to establish a baseline of the current state of your physical campus. Our ROPA solution relies on standardized data collection practices and procedures. Our team uses the same process and templates at each member institution to assure accuracy and apples-to-apples comparisons. This phase includes: Offsite Collecting of Base Data. Our team leads an offsite discovery process for every campus by</p>
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extracting large amounts of base data from disparate local sources and converting them into usable information and knowledge.

A Kickoff Meeting and Campus Visit. Once our team arrives onsite and you have been introduced to your project team, the first step is to discuss the details of the project during the kick-off meeting.

Onsite Collecting of Data. We conduct an onsite collection and assembly of space, capital, and operations data across more than 200 facilities metrics, which allows for the establishment of a minimum five-year performance trend. This extensive data foundation is critical for informed decision-making and long-term planning.

The QVQ (Quantify, Verify, Qualify) Process

An accurate facilities performance database is at the core of Gordian's work and the successful identification of opportunities for improvement. Utilizing our standard Quantify, Verify, Qualify (QVQ) approach, we ensure that data collection is consistent, performance measurement is accurate, and the information provided is reliable. This step instills confidence in the comparative data used for strategic analysis.

- Quantify. Onsite exercise to assemble five years of facilities operations and asset management performance data
- Verify. Validate that the data gathered into Gordian templates accurately reflects the known understanding of the campus through a series of performance metric tests.
- Qualify. Meeting(s) conducted with campus staff to ensure proper interpretation of base data and for Gordian staff to question data that appears inconsistent with peers or anticipated outcomes.

Base Data Collected

The base data that Gordian collects is provided below.

Campus Profile

Building Information

- Building construction date
- Major building renovations
- Building function (resident hall, athletic, etc.)

Building gross square footage (GSF), land acres

- Locations served by central systems (heating, cooling, electrical)

Deferred Maintenance

- Deferred maintenance assessment (in-house or contracted)

Project Lists

- Completed projects both operating and capital funds
- New construction costs

Operations

Staffing Table

- Department organizational chart
- Distribution of trades, custodial, and grounds staff by shop—including

supervisors

Work Order Report

- Total number of requested and completed work orders
- Completed work orders by shop and type—repair, PM, project, etc.

Energy Profile

- Monthly utility cost and consumption by fuel type—gas, oil, electric
- Primary generation equipment profile including hours of operation

Finance

Institutional Financial Statement

- Balance sheet and operating budget

Facilities Operating Budget

- Operating budget and actual by the department and line item

Capital Budget

- Recurring capital budget—plant-funded R&R account—and capital Data Development and Analysis Phase

As Gordian transitions to the Data Development and Analysis Phase, we assess your current situation and determine how well-positioned you are to address exposures. This is done by creating a historical performance profile and peer comparisons which lead to objective observation, contextual understanding, and strategic discussion. This phase includes:

- Data Processing. After the on-site work is complete, the Gordian assessment team(s) reviews their notes and findings and process the data collected.
- Benchmarking for Competitive Insight. By creating longitudinal and comparative benchmarks utilizing experience and data from 450 institutions, we identify areas for improvement and provide a clear perspective on how your institution's performance measures up against peers.
- Strategic Issue Analysis. Gordian sheds light on where existing practices will take your campus and explores different approaches to create a better future. We delve into campus-specific issues to understand their impact on performance and help set balanced investment targets. This tailored analysis ensures that strategies are finely tuned to the unique challenges and opportunities of your institution. This insight is invaluable in helping you gain a competitive edge and direct investment where it can have the most impact.

Performance Measurement and Optimization Phase

With priorities defined and understood, decisions about your facilities can enable action toward institution goals and a sustainable future for your campus. We provide an invaluable continuous improvement cycle by acknowledging historical accomplishments, setting targets

based on internal goals and industry best practices, and ensuring progress is sustained. The Performance Measurement and Optimization Phase includes:

- Projecting Capital Renewal Needs. Gordian delivers forecasts of your facility's future investment needs by analyzing its lifespan, spending trends, and deferred maintenance growth. This foresight enables the strategic alignment of funds with priority projects to mitigate critical maintenance backlogs. Key steps include:
 - Projecting a 10-year system needs using life cycle cost data and institutional insights.
 - Comparing investment capacity against future needs to gauge investment impact on deferred maintenance.
 - Formulating action plans to reduce system failure risks and enhance the educational environment.
- Defining Strategic Metrics and Objectives. We include both operating and capital metrics to define the annual investment target needed to maintain and extend building lifecycles. Gordian documents your historical investment performance—positive or negative—and the financial implications of the actions. If negative, there is a direct correlation between the backlog and the root cause of its growth. Performance measurement also tracks non-facilities factors that influence facility operating and capital directions, including:
 - Institutional Changes. New space, enrollment changes, budget pressures.
 - External Factors. Economic, demographic, and regulatory.
 - Competitive Issues. New programs, and student and faculty recruitment.
- Creating Performance Dashboards. By creating intuitive performance dashboards, we enable the selection and management of changes, targeting key improvement opportunities, and defining the pace of change to ensure manageable and sustainable progress.
- Benchmarking and Tracking. We facilitate tracking of your results against best-in-class performers, offering a clear benchmark for excellence and a roadmap for continuous improvement.
- Dynamic Goal Setting. Recognizing that campuses are ever-evolving, we ensure that goals are reevaluated and adjusted in response to changes in the campus environment, ensuring that your strategies remain relevant and effective.

Deliverables Phase
 During the Deliverables Phase, objective observations from our analysis are shared to empower knowledge-based decisions. This approach helps in crafting data-driven

strategies, ensuring that investments are made wisely and with a clear understanding of their expected outcomes.

Our third-party perspective gives us the ability to effectively remove subjectivity and make credible recommendations that speak to the concerns of all stakeholders and help you reach the best outcomes for your institution. Gordian's success tells us that effective deliverables must be understandable. Therefore, strategic and technical information must be integrated to ensure policy initiatives can be easily translated into tactical actions for implementation at all levels of the organization. During our initial year at each institution, Gordian provides three (3) presentations as deliverables:

- A data qualification meeting as part of the QVQ process
- Preliminary presentation that shares initial findings and strategic recommendations with campus/entity leadership
- Final presentation/report developed in conjunction with the member to deliver a focused, simplified story to an executive or board-level audience

PDF copies of all presentations are delivered by the team throughout the engagement.

Project Completion
The project will be considered complete when the presentation has been delivered.

ROPA Renewal

- Each year Gordian will work with the facility leadership to update any changes that have occurred within the previous year. All changes will be made in the software to keep the database up to date. This includes but is not limited to:
 - Building inventory to add/remove buildings
 - Mark projects completed
 - Project Pricing
 - Project Scoring
 - Building Portfolios
 - Investment Criteria
 - Project Category
- All ROPA data—space, capital, and operations—will be updated with the most recent fiscal year data to track progress toward goals.
- A presentation will be provided annually that reflects the new data produced through the SCP and the ROPA services to an audience of your choosing.

Post-Project Support and Partnership Opportunities
Gordian is committed to offering flexible post-project support tailored to your specific needs. Subsequent years feature two presentations:

- Qualification
- Final

Presentations are trustee quality and encourage key campus personnel to participate in the final deliverable

			<p>presentation. In addition to presentation deliverables, campus personnel receive access to Gordian's Member Portal, an online platform that provides quick access to facilities data, the ability to run comparative reports among all other ROPA Members, and read access to reports and deliverables.</p>
85	Project management and coordination with facility owners	<input type="radio"/> Yes <input checked="" type="radio"/> No	
86	Contract management and financial monitoring	<input type="radio"/> Yes <input checked="" type="radio"/> No	
87	Budget development, and program management services	<input checked="" type="radio"/> Yes <input type="radio"/> No	<p>Capital Planning Program Development</p> <p>Gordian has found that our most successful customers have developed a capital planning program framework to ensure that they have a coordinated approach to capital planning throughout their organization. By building a framework, an organization can create a plan to grow from its current capital planning process to one that is more aligned with industry best practices. A capital planning program framework enables an organization to:</p> <ul style="list-style-type: none"> • Develop a better understanding of their current capital planning process • Achieve better ROI on their capital planning software investment • Increase productivity • Deliver information where and when it is needed • Determine an appropriate short, intermediate, and long-term roadmap to achieve a robust and scalable program <p>Based on our discussions with your organization, Gordian provides recommendations to help you implement and sustain a facility capital planning program using our strategic capital planning program solution framework. Our framework has proven to be an effective way to identify the strengths and challenges in current practices and to identify and mobilize your organization's resources to implement new, more effective processes in a structured but flexible way. To accomplish this, Gordian proposes to:</p> <ul style="list-style-type: none"> • Develop a high-level understanding of the customer's existing capital planning process • Review existing capital planning process and further delineate and document the process, to make practice recommendations including how to effectively leverage Gordian Capital Planning software in their processes(es) • Assist the customer's capital planning team in developing a short, mid, and long-term roadmap based on those prioritizations • Identify in the proposed process where procedures are recommended to be developed

Our proposed approach includes the following steps:

Project Kick-off Meeting (web-based)
 To discuss logistics and workshop team, request customer-supplied information, and schedule the pre-workshop via Internet meeting and on-site workshop. Types of information:

- Example of a current capital plan
- Guidelines, procedures, or other written documentation; graphics that describe the current capital planning process
- Organizational charts of groups/departments that are part of the capital planning process and/or will participate in the workshop

Pre-Workshop (web-based)
 To review the goals and objectives of the workshop, as well as questions and information to be discussed during the workshop to allow your capital planning team to prepare for the workshop.

- Gordian reviews the workshop goals, objectives, and structure.
- The customer presents a high-level overview of software currently used in their capital planning process.

Conduct a Situation Analysis
 Gordian facilitates a two-day, on-site workshop with your capital planning team to specifically review their capital planning processes, the current software being used, and the people involved in the processes.

A situation analysis involves obtaining an understanding of the facilities landscape that exists for the organization relative to your organization's capital planning process. This includes the building portfolio, software systems, people, and processes. Gordian documents what currently exists, what is working well, as well as areas that need improvement for your capital planning process.

The questions may include:

- What is your mission?
- What are your goals and how do they support your mission?
- What is the existing process?
- What works well and why?
- What doesn't work well and why?
- What systems do you leverage to assist you in the capital planning process?
- How are the current day-to-day needs communicated?

Determine Program Goals and Objectives
 The next step in the engagement is to formulate goals and objectives for the program. These goals and objectives can be viewed as business requirements. The situation analysis, in conjunction with your organizational goals and objectives, is the basis from which we formulate the Gordian solution.

Develop Recommendations and Strategies for Improvement
 Based on the analyses identified above, Gordian develops

recommendations and strategies for improvement. The recommendations and strategies are presented in phases, typically short, intermediate, and long-term. Short-term recommendations allow for quick wins that give the program traction and credibility. The Intermediate and Long-Term stage recommendations bring your program to a higher level and position it for a mature, fully integrated process. The recommendations also identify areas where more detailed procedures should be developed.

Milestones/Deliverables

1. Project Kick-off (web-based)
2. Pre-workshop (web-based)
3. Review of Member supplied materials (if provided)
4. 2-day on-site workshop

Alternatively, in cases where a travel restriction may be in place, this workshop may be delivered remotely via the web and would include four, 3-hour web-based sessions, to be scheduled on mutually agreed upon days and times.

5. Roadmap illustrating short, intermediate, and long-term recommendations

6. Draft report outlining situation analysis, goals and objectives, recommendations, and roadmap

7. Final report incorporating agreed-upon feedback from the draft report

Capital Planning Program Development – Process Map— Optional Service

Based on the workshop discussions, Gordian creates a process map that illustrates how your organization can leverage the Gordian Cloud Platform (GCP) software and its facility condition assessment data into its overall capital planning program. The overall capital planning process is presented at a high level.

The process map is typically organized in “swim lanes,” with each lane depicting a major process. For example: large cap, mid cap, small cap. If applicable a separate “swim lane” may be shown for each.

Gordian selects and illustrates the processes that best benefit from leveraging the GCP. These may include:

- Initial Data Alignment
- Data Maintenance
- Small Cap
- Mid Cap
- Large Cap
- Key points where the data can be used to inform other processes, such as project management and corrective and preventative maintenance

In line with recommendations in the report, the process map also identifies gaps in the overall process that would assist your organization to become more in line with best practices.

Milestones/Deliverables

			<p>A Process Map will be delivered illustrating how the GCP and the facility condition assessment data can be effectively leveraged into your organization's capital planning process.</p> <p>Project Review Once the above work has been completed, Gordian notifies the customer via email, and your organization will have 10 business days to review and provide feedback regarding any requested modifications.</p> <p>Project Close Upon the completion of the review period, Gordian provides written notice to your organization that states the delivery of Services is complete.</p>
88	Assessment and planning services complementary to the offering of solutions described in lines 77 to 87 above.	<input checked="" type="radio"/> Yes <input type="radio"/> No	<p>Site Linear Data Development and Assessment</p> <p>The FCA Site Linear Data Development and FCA+ Site Linear Assessment involve a review of the same systems and active collaboration with customer personnel to ensure data accuracy and relevance. The primary difference lies in the method of evaluation—where the FCA data development focuses on virtual collaboration and predictive modeling, the FCA+ assessment includes physical site inspections and a more granular analysis of asset conditions. Both ensure the customer is equipped with the necessary information for informed decision-making regarding maintenance prioritization, capital planning, and strategic investment in your site and utility infrastructure.</p> <p>Approach Gordian's approach to site linear data development and assessment includes an evaluation and analysis of the following systems:</p> <ul style="list-style-type: none"> • Roadways • Parking Lots • Lighting • Major Pedestrian Walkways • Architectural and Sports Field <p>Fencing</p> <ul style="list-style-type: none"> • Primary Electric Supply & Distribution • Sanitary Sewer • Playground Equipment • Retaining Walls over 5' in Height • Fixed Benches and Other <p>Appurtenances</p> <ul style="list-style-type: none"> • Exterior Steps • Storm Water System • Fuel Supply and Storage • Water Supply and Distribution • Chilled Water Distribution • Steam & Condensate Distribution • Heating Hot Water Distribution • Irrigation Systems <p>Site Linear Data Development (FCA) The data development phase of your facility condition assessment includes:</p> <ul style="list-style-type: none"> • Interviews. Virtually engaging with facility personnel to collect historical and current data on the condition and performance of site and utility assets. • Data Migration. Partnering with the customer to integrate this data into the Gordian Cloud Platform,

ensuring centralized and accessible asset information.

- Modeling. Utilizing provided data sets to create predictive models that represent the maintenance needs and condition of your systems for future planning.

Site Linear Assessment (FCA+)
The assessment phase of your facility condition assessment includes:

- Physical Evaluation. The Gordian team physically inspects and assesses visible systems, complemented by a review of maintenance records.
- In-depth Interview. Gaining further insights through in-person discussions with personnel knowledgeable about each asset, particularly for components that are not readily visible or accessible.
- Construction and Maintenance Records. Collecting and reviewing maintenance records, site plans, and site utility drawings to gain insight and gather information related to system type, age, quantities, and condition.
- Data Construction. Compiling and analyzing all gathered information to construct comprehensive data models, including cost estimates and condition assessments at a Unifomat level.

Site Linear Data Development and Assessment Data Capture
We have uploaded the file Table 8B-Depth and Breadth of Offered Solutions-Question 88-Site Linear Data Development and Assessment Data Capture.

Strategic Assessment Insights
Gordian has developed a series of tools that complement our Facility Condition Assessments that can assist your organization in defining a multi-year investment plan. Our Strategic Assessment Insights solution brings the concepts of financial investment and portfolio-based wealth management to the facilities world, treating each facility and grounds feature as an investment-worthy asset rather than a financial liability. This strategic focus allows decision-makers to target investments that reflect your organization's mission and ensure each dollar is allocated to the highest priority.

Once your assessment is complete, Gordian engages you through the following steps:

Strategic Assessment Insights Development

- Customize Strategic Tools. Successful long-term planning requires more than a technical baseline. Gordian uses an array of strategic concepts as tools to tie facilities projects to the mission and vision of leadership and define a framework for reinvestment funding. The primary strategic and functional prioritization tools are outlined below though others may be added as necessary to ensure a robust toolkit.

			<p>Building Portfolios. Organizing facilities into a portfolio of assets provides the means to reflect existing priorities and future aspirations.</p> <p>Project Category. The classification of a project helps to differentiate between a “want” versus a “need.”</p> <p>Project Package. Typical packages are Building Envelope, Building System, Infrastructure, Space Renewal, and Safety/Code.</p> <p>Timeframe. Multi-year investment timeframes—immediate investment needs, 1-3 years, 4-7 years, 8-10 years, etc.—establish useful investment horizons based on age and condition.</p> <p>Investment Criteria. Gordian uses Investment Criteria to help decision-makers understand the importance or impact of a project.</p> <ul style="list-style-type: none"> • Develop a Multi-year Capital Plan. The goal of the facility planning process is to define a credible, affordable, and actionable plan. To accomplish this, Gordian engages leadership in an exercise that guides future investment decisions and ensures the effective use of capital investment funds. • Project Selection. With an investment plan in place, the process of deciding which projects to accomplish and in what sequence can commence. Understanding that annual priorities shift and impact project selection, these decision tools become an integral part of the planning and prioritization process moving forward. <p>Gordian works with your organization to assign a custom scoring methodology to rank projects within facilities where a condition assessment was conducted or those facilities that otherwise have modeled component-level detail.</p> <p>Strategic Assessment Insights Delivery Gordian deliverables are designed to effectively communicate findings to build broad support in the organization and integrate with existing management systems. Along with sessions throughout the process to gather necessary information and insights, Gordian delivers a completed strategic capital plan and recommendations for the next steps. This presentation recommends a strategic course of action as well as:</p> <ul style="list-style-type: none"> • Provides context of historical funding levels and details backlog origin. • Gives a summary-level overview of facilities needs highlighting key strategic issues. • Summarizes Gordian’s recommendation for a portfolio investment plan that ties to priorities and available funding. <p>As directed, an additional presentation can be given to senior leadership (e.g., CFO, President, Cabinet, Board of Trustees) or the appropriate audience at your</p>
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organization.
 Post-Project Support and Partnership Opportunities
 Gordian is committed to offering flexible post-project support tailored to your specific needs, whether it is refreshing your data and facility asset inventories or providing sustained access to the Gordian Cloud Platform. For an additional fee, our partnership ensures that your team is equipped with the latest tools and information for efficient and effective facility management.

Assessment Data Update
 The true mark of success for any capital investment program is securing ongoing funding—approval for the second, third, and subsequent rounds of investment is key. The cornerstone of building this trust is the ability to track and showcase the program's achievements. Gordian suggests an annual update process that independently confirms performance and demonstrates progress toward the attainment of goals.

Ongoing annual support includes:

- Annual documentation of projects completed, their cost, and impact on the phase-out plan.
- Documenting and updating the project inventory for any "new" customer-provided projects.
- Qualification of data updates to ensure accuracy.

Strategic Assessment Insights Update
 In conjunction with annual data updates, strategic assessment insights can be updated to reflect the status of your database. As key investments, divestments, or other facility or asset decisions are made, stakeholders must remain informed, and progress toward your strategic plan is tracked. Your Gordian Project Manager facilitates the update of key deliverables and hosts a formal presentation of findings to stakeholders of the customer's choosing. Gordian deliverables can be designed appropriately for a wide variety of audiences, including executive leadership summary presentations.

Data Migration
 Gordian has extensive experience in importing data from various third-party systems. In partnership with the customer, Gordian plans and executes the integration of critical data into the Gordian Cloud Platform, ensuring a seamless transition.

Step 1. Data Migration, Mapping, and Update
 The initial phase involves mapping and migrating current data to the Uniformat II standard, linking lifecycles and costs to Gordian's RSMMeans data—the industry-leading construction cost data. Critical strategic tools, including building portfolios, project scoring, investment criteria, and project category are transitioned to an online format. Additionally, all existing

project notes are transferred to preserve the integrity and continuity of information. This process includes an analysis of the current data's structure, identifying essential data for transfer, and ensuring accurate alignment with the new application's fields.

Step 2. Interviews with the Customer's Supervisors

To ensure the migrated data in the Gordian Cloud Platform is current and accurately reflects the customer's needs, interviews are conducted.

These interviews focus on updating costs, evaluating the timing of needs, and identifying any elements that must be removed or new data that should be added. The goal is to tailor the project schedule to your organization's current state, ensuring that the data is up-to-date and optimized for operational efficiency and strategic planning. This process is a crucial step in maintaining the relevance and utility of the Gordian Cloud Platform, providing the customer with a reliable and responsive tool for your cost and data management needs.

Step 3. Qualify and Present Data Update

Ensuring data integrity throughout a system transition is critical. Our process involves pre-transition assessments to establish data quality, followed by thorough cleaning and standardization to resolve any discrepancies. After the transition, we conduct comparisons and integrity checks to verify the accuracy of the migrated data. Finally, the results of the data migration are presented to the customer. User validation and continuous monitoring are essential to confirm the data's reliability and functionality in the Gordian Cloud Platform. This approach guarantees that the transitioned data meets our high standards of quality and integrity, providing your organization with confidence in your new system's results.

Step 4. Access to the Gordian Cloud Platform

After historical data has been migrated and updated, users are given access to an ever-improving ecosystem where they can access key details on projects, download data reports, and access charts, and graphs. As new features are rolled out, users gain access to these enhancements along with guidance on their utilization to ensure smooth adoption and integration into their workflows.

Step 5. Support and Resources

Gordian provided support and customization during the setup process to ensure each user has easy access to the most valuable information and is equipped with the knowledge to utilize it. Gordian's Capital Planning software features a user-friendly interface designed for ease of use, enabling the customer

to maximize the software's full potential effortlessly. With an extensive help system in place, users have immediate access to support and resources, ensuring a simple and efficient onboarding experience.

Notes

- No photo imports are included in this scope.
- All work is performed remotely and via online meetings with the customer.

Preventive Maintenance

Facility maintenance schedules at the customer organization are crafted using a comprehensive review of facilities, equipment, and staffing to tailor a program that meets your unique requirements. An extension of the standard facility condition assessment includes cataloging facility systems for routine inspections and maintenance, with each component rated by condition. We generate recommended preventive maintenance (PM) tasks and frequencies for various facility components, drawing from manufacturer guidelines and industry best practices, as well as the customer's and consultants' experiences.

The foundation of our PM approach is the principle that similar equipment necessitates comparable maintenance tasks. For example, the fundamental maintenance steps for a five-ton rooftop air conditioning unit are consistent with those for a 50-ton unit, although the effort and duration may vary. We categorize equipment data by type, ensuring PM tasks are appropriately assigned.

It's crucial to recognize that PM plans are dynamic and should evolve based on real-world performance, closed work orders, and feedback. These plans are initial guidelines, and we anticipate modifications to optimize efficiency and effectiveness. For instance, a five-ton unit might require different PM steps or frequencies compared to a 50-ton unit, with adjustments informed by technician feedback and operational data.

Following is an example of PM equipment tasks:

Asset Group: HVAC

Asset Type: Packaged Roof Top Unit - Gas Heat

Frequency: One/year

Task Name: Summer Start-Up

Task Descriptions:

- Remove old air filters
- Clean coils
- Inspect coils
- Check compressor efficiency
- Check refrigerant levels, note any losses, and report as required
- Visually inspect belts—

tighten/replace as necessary

- Clean the condensate pan and trap

- Inspect contactors and wiring

- Check and adjust for proper airflow

- Lubricate motors and bearings
- Check and calibrate sensors and thermostats

PM tasks are provided in either Excel or PDF

Integrated Facilities Program (IFP)
 Gordian's IFP solution helps you create an analytical decision-making framework that aligns facility initiatives with strategic priorities and ensures that every scarce dollar available on campus is invested with purpose and precision. Gordian's three areas of focus are:

- Peer and historical benchmarking to contextualize current facilities' challenges both capitally and operationally
- Capital needs assessment and associated investment strategy to increase the confidence and effectiveness of capital requests.
- Teaching space utilization assessment to assist with decision-making around space allocation and major construction projects.

Phases of the IFP Solution
 The IFP solution is implemented through five phases:

- Project Initiation Phase
- Data Discovery Phase
- Analysis and Diagnosis Phase
- Action Planning Phase
- Deliverables Phase

Each of these phases is described in the following sections

Project Initiation Phase
 The Project Initiation Phase of IFP is the foundational stage where the groundwork for the entire process is established.

Introduction to the Project Team and Project Kick-off Meeting
 Once you have been introduced to your project team, the first step is to discuss the details of the project during the kick-off meeting.

Set Goals
 To kick off the project, your designated Gordian Project Manager sets up a meeting with your organization's key stakeholders for introductions and to confirm the goals and objectives for the project.

Understanding what your organization wants to achieve with this project is the key to its success and drives the project effort, ensuring the end deliverable best meets your expectations and goals.

Confirm Scope and Deliverables
 During the initiation phase, the Gordian Project Manager collaborates with key stakeholders to establish and document the parameters for the project. A scoping meeting is held to discuss and confirm schedules, criteria, and data classifications. Often the goal setting and confirmation of scope and deliverables can be discussed and agreed upon in one meeting.

Management Plan
 The Gordian Project Manager conducts regular progress meetings throughout the phases of the project

to maintain open communication. The frequency of progress meetings is determined during the initial engagement phase of the project. A schedule is provided to illustrate the usual phases and milestones of the project, including tasks and durations of your required involvement. The project schedule is maintained by Gordian's Project Manager who oversees each task, communicates at both the project management and team levels, and tracks changes closely.

Example Project Schedule

The process and timeline will vary depending on the priorities at [INSTITUTION NAME]. Each focus area will follow roughly the same process:

- Collect key data
- Review and qualify data to ensure accuracy
- Analyze qualified data for trends and key findings
- Develop recommendations and results

• Deliver key findings and recommendations to leadership

Typical timelines for each focus are:

- 8-10 Weeks. Peer benchmarking, operational analysis, and historical performance review
- 18-22 Weeks. Capital needs assessment, strategic investment toolkit development, and capital scenario planning

- 10-12 Weeks. Teaching space utilization assessment, condition and technology review, and user focus groups

Timelines provided are rough and subject to change based on the availability of existing information and key on-campus staff.

Data Discovery Phase

During the IFP solution's Data Discovery Phase, Gordian engages with key stakeholders in facilities, finance, and registrar to collect onsite multi-year financial, operational, and space management data through detailed building inspections and technical assessments. This data is then validated with campus stakeholders.

The collection includes source data on:

- Space. The inventory of buildings and teaching spaces as well as the walkthrough effort to assess conditions and technology within facilities.
- Capital. Facilities project expenditures and Gordian conducted facilities supervisor interviews to gain first-hand knowledge of existing conditions and establish future capital needs.
- Operations. Operating budgets, staffing levels, energy use, and maintenance activities.

Gordian implements our Quantify, Verify, Qualify (QVQ) Process to ensure the highest level of quality and consistency in our data collection and

analysis. Using QVQ, Gordian:
 Collects data onsite
 Uses standard templates to gather valid comparative information
 Creates a five-year performance trend for all data
 Correlates performance metrics and logical data relationships to establish confidence
 Qualifies the data via presentation to key institutional personnel
Analysis and Diagnosis Phase
 In the Analysis and Diagnosis Phase, Gordian utilizes qualified data to provide a 360-degree view of facilities' performance and identify strategic opportunities for improvement. In an on-campus or remote presentation of the findings, Gordian:

- Reviews longitudinal trends of institutional data to understand historical performance using Gordian's Return on Physical Assets (ROPA) framework.
- Utilizes peer benchmarking, using the ROPA framework, to provide a context of performance.
- Examines the interrelationships between space, capital, and operations to provide a complete picture of priorities. This includes reviewing the project inventory of deferred maintenance, future capital needs, and academic space utilization.
- Assesses how resource levels have impacted service delivery.
- Identifies key recommendations and sets goals for improvement.

Action Planning Phase
 During the Action Planning Phase, Gordian collaborates with key customer stakeholders to develop strategies and initiatives linked to space, capital, and operations to achieve the goals identified in the analysis and diagnosis step, align facilities needs with your campus mission, and provide recommendations for tactical initiatives. Past recommendations include:

- Developing institutional policy around the addition of new space (for example, no net new space) and identifying buildings for potential divestment.
- Consolidating course scheduling to be centrally scheduled and identify potentially underutilized classrooms that would become available.
- Developing a framework for allocating capital funding in alignment with institutional priorities and providing a project scoring methodology.
- Setting building condition—(Net Asset Value—thresholds by types of buildings or by building groupings and identifying specific buildings to target for renovations.
- Establishing standards for the use of contracted services versus in-house staff and identifying potential

resource rebalance.;

- Creating a policy that recycles energy savings back into capital projects and identifying those projects that provide an economic opportunity for payback.

Deliverables Phase

During the Deliverables Phase, objective observations from our analysis are shared to empower knowledge-based decisions. This approach helps in crafting data-driven strategies, ensuring that investments are made wisely and with a clear understanding of their expected outcomes.

Our third-party perspective gives us the ability to effectively remove subjectivity and make credible recommendations that speak to the concerns of all stakeholders and help you reach the best outcomes for your institution. Gordian's success tells us that effective deliverables must be understandable. Therefore, strategic and technical information must be integrated to ensure policy initiatives can be easily translated into tactical actions for implementation at all levels of the organization.

Gordian deliverables are designed to effectively communicate findings to build broad support in the organization and integrate with existing management systems. Gordian integrates strategic and technical information to ensure that policy initiatives can be easily translated into tactical actions for implementation at all levels of the organization. During our initial year, Gordian will provide two presentations as deliverables:

- Preliminary presentation that shares full results of the analysis and diagnosis with campus leadership.
- Final presentation developed in conjunction with the member institution to deliver a focused, simplified overview of the action plan to an executive or board-level audience.

Project Completion

The project will be considered complete when the presentation has been delivered.

Post-Project Support and Partnership Opportunities

Once the goals have been set and the strategy is in place, Gordian tracks performance against the plan and associated targets and provides recommendations for course correction if and when priorities shift. This includes:

- Quarterly member value meetings
- Guidance and performance tracking against the action plan
- Annual data updates
- Continuous online access to data findings and key metrics
- Strategic facilitation as needed

In addition to tracking progress, Gordian's member services team will be available for analytical and strategic support as needed. This may include (but is not limited to):

- Providing customized data analysis to answer pressing facilities-related questions
- Supplying materials or deliverables to be used in meetings with senior leadership or the board
- Presenting onsite on behalf of the institution in a key leadership meeting—limited to once per year

Flexible Professional Services Hours
 Gordian's Flexible Professional Services Hours are designed to provide individualized assistance to ensure software usage comfort, proficiency, and adoption.

Customers can take advantage of having a consulting team on call to assist them with many facets of their capital planning tasks and processes. These hours may be utilized to provide a "lifeline" that a Customer can use to connect with a solution consultant via a phone call and/or web conference for assistance in using Gordian's ACP software to generate specific reports, extracting a specific set of data to address time-sensitive problems or mission-critical questions, or updating their database records to reflect work that has been completed, post-assessment.

An initial block of 20 hours is provided under this proposal. All phone or email requests for services count towards the customer's available block of Flexible Professional Services Hours. Gordian notifies the customer if the contracted hours have been exhausted, for authorization for additional hours. Gordian's Flexible Professional Services Hours are intended to be delivered remotely and, as such, travel expenses are not included in any fees and are billed as incurred if travel to the customer's site is requested.

Gordian does not guarantee any specific deliverables will be provided within the allotted hours or that any specific resource will be available. Gordian shall be responsible for securing, managing, scheduling, coordinating, and supervising Gordian personnel, including its subcontractors, in performing the Professional Services. Gordian shall have prior approval of the Services to be provided for the hours listed herein.

The following are some examples of how our existing customers are utilizing these hours to fulfill their needs. Examples of items that are and are not included are:

- Mobile Software Functionality—
 How to use the Mobile Asset Capture (MAC) app

Our team can use a portion of your hours to guide you through best practices for utilizing the MAC app for data collection in the field, focusing on required fields, creating/updating data, cost item selection, app navigation, and data syncing.

		<ul style="list-style-type: none"> • Platform Data Management- How to set up and use the Gordian Cloud Planning software Our team can use a portion of your hours to aid in the setup and walk you through the functionality of Gordian Cloud Planning software, focusing on facility creation, asset creation/editing, platform navigation, data management, and core software functionality. • Capital Planning Best Practices- Making the case for additional resources Our team can use a portion of your hours to provide insights to enhance capital planning efforts, based upon our years of experience assisting customers with their capital planning needs, focusing on the utilization of capital planning tools within the Gordian Capital Planning software, data codification for strategic goals, facility portfolio creation, and presentation assistance. Additionally, the hours MAY also be applied to the following: <ul style="list-style-type: none"> • Ad Hoc Data Updates • Data Importing • Data-related Questions and Support • Executive and Board-Level Presentations and Reports • Software Support "Ask-the-Experts" Web-based sessions • One-on-one Advanced Web-based Training • Other consulting services (to be mutually agreed upon) <p>Hours MAY NOT be applied to the following:</p> <ul style="list-style-type: none"> • Formal Group Training Classes (remote or onsite) • Formal Consulting workshops (remote or onsite) • Configuration or functionality changes requiring a change to the code base
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Exceptions to Terms, Conditions, or Specifications Form

Only those Proposer Exceptions to Terms, Conditions, or Specifications that have been accepted by Sourcewell have been incorporated into the contract text.

Documents

Ensure your submission document(s) conforms to the following:

1. Documents in PDF format are preferred. Documents in Word, Excel, or compatible formats may also be provided.
2. Documents should NOT have a security password, as Sourcewell may not be able to open the file. It is your sole responsibility to ensure that the uploaded document(s) are not either defective, corrupted or blank and that the documents can be opened and viewed by

Sourcewell.

3. Sourcewell may reject any response where any document(s) cannot be opened and viewed by Sourcewell.

4. If you need to upload more than one (1) document for a single item, you should combine the documents into one zipped file. If the zipped file contains more than one (1) document, ensure each document is named, in relation to the submission format item responding to. For example, if responding to the Marketing Plan category save the document as "Marketing Plan."

- [Pricing](#) - Gordian Sourcewell Pricing 2024 - Market Basket.xlsx - Wednesday October 23, 2024 14:27:23
- Financial Strength and Stability (optional)
- [Marketing Plan/Samples](#) - Table 4- Marketing Plan-Question 40.pdf - Wednesday October 23, 2024 14:27:52
- WMBE/MBE/SBE or Related Certificates (optional)
- [Standard Transaction Document Samples](#) - Table 6-Pricing-Question 61-Gordian Additional Terms.pdf - Wednesday October 23, 2024 14:29:36
- [Requested Exceptions](#) - Table 9-Exceptions to Terms, Conditions, or Specifications Form-RFP_102424_Facility_Assessment_and_Planning_Contract (Gordian Revisions).pdf - Wednesday October 23, 2024 14:33:28
- [Upload Additional Document](#) - Table 8B-Depth and Breadth of Offered Solutions-Questions 77 and 88.pdf - Wednesday October 23, 2024 14:53:38

Addenda, Terms and Conditions

PROPOSER AFFIDAVIT OF COMPLIANCE

I certify that I am an authorized representative of Proposer and have authority to submit the foregoing Proposal:

1. The Proposer is submitting this Proposal under its full and complete legal name, and the Proposer legally exists in good standing in the jurisdiction of its residence.
2. The Proposer warrants that the information provided in this Proposal is true, correct, and reliable for purposes of evaluation for award.
3. The Proposer certifies that:
 - (1) The prices in this Proposal have been arrived at independently, without, for the purpose of restricting competition, any consultation, communication, or agreement with any other Proposer or competitor relating to-
 - (i) Those prices;
 - (ii) The intention to submit an offer; or
 - (iii) The methods or factors used to calculate the prices offered.
 - (2) The prices in this Proposal have not been and will not be knowingly disclosed by the Proposer, directly or indirectly, to any other Proposer or competitor before award unless otherwise required by law; and
 - (3) No attempt has been made or will be made by Proposer to induce any other concern to submit or not to submit a Proposal for the purpose of restricting competition.
4. To the best of its knowledge and belief, and except as otherwise disclosed in the Proposal, there are no relevant facts or circumstances which could give rise to an organizational conflict of interest. An organizational conflict of interest is created when a current or prospective supplier is unable to render impartial service to Sourcewell due to the supplier's: a. creation of evaluation criteria during performance of a prior agreement which potentially influences future competitive opportunities to its favor; b. access to nonpublic and material information that may provide for a competitive advantage in a later procurement competition; c. impaired objectivity in providing advice to Sourcewell.
5. Proposer will provide to Sourcewell Participating Entities Solutions in accordance with the terms, conditions, and scope of a resulting master agreement.
6. The Proposer possesses, or will possess all applicable licenses or certifications necessary to deliver Solutions under any resulting master agreement.
7. The Proposer will comply with all applicable provisions of federal, state, and local laws, regulations, rules, and orders.
8. Proposer its employees, agents, and subcontractors are not:
 1. Included on the "Specially Designated Nationals and Blocked Persons" list maintained by the Office of Foreign Assets Control of the United States Department of the Treasury found at: <https://www.treasury.gov/ofac/downloads/sdnlist.pdf>;
 2. Included on the government-wide exclusions lists in the United States System for Award Management found at: <https://sam.gov/SAM/>; or
 3. Presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from programs operated by the State of Minnesota; the United States federal government, as applicable; or any Participating Entity. Vendor certifies and warrants that neither it nor its principals have been convicted of a criminal offense related to the subject matter of this solicitation.

By checking this box I acknowledge that I am bound by the terms of the Proposer's Affidavit, have the legal authority to submit this Proposal on behalf of the Proposer, and that this electronic acknowledgment has the same legal effect, validity, and enforceability as if I had hand signed the Proposal. This signature will not be denied such legal effect, validity, or enforceability solely because an electronic signature or electronic record was used in its formation. - Ammon Leshner, Chief Operating Officer, The Gordian Group, Inc.

The Proposer declares that there is an actual or potential Conflict of Interest relating to the preparation of its submission, and/or the Proposer foresees an actual or potential Conflict of Interest in performing the obligations contemplated in the solicitation proposal.

Yes No

The Bidder acknowledges and agrees that the addendum/addenda below form part of the Bid Document.

Check the box in the column "I have reviewed this addendum" below to acknowledge each of the addenda.

File Name	I have reviewed the below addendum and attachments (if applicable)	Pages
Addendum_8_RFP_102424_Facility_Assessment Wed October 16 2024 04:32 PM	<input checked="" type="checkbox"/>	2
Addendum_7_RFP_102424_Facility_Assessment_&_Planning Fri October 11 2024 02:15 PM	<input checked="" type="checkbox"/>	1
Addendum_6_RFP_102424_Facility_Assessment Fri October 4 2024 02:43 PM	<input checked="" type="checkbox"/>	1
Addendum_5_RFP_102424_Facility_Assessment Wed October 2 2024 01:31 PM	<input checked="" type="checkbox"/>	1
Addendum_4_RFP_102424_Facility_Assessment Tue October 1 2024 10:09 AM	<input checked="" type="checkbox"/>	1
Addendum_3_RFP_102424_Facility_Assessment Fri September 27 2024 08:36 AM	<input checked="" type="checkbox"/>	1
Addendum_2_RFP_102424_Facility_Assessment Tue September 17 2024 08:47 PM	<input checked="" type="checkbox"/>	1
Addendum_1_RFP_102424_Facility_Assessment Wed September 11 2024 02:41 PM	<input checked="" type="checkbox"/>	1



Certificate Of Completion

Envelope Id: FDB2B1A2-5E6E-4E27-90EA-69D108205971	Status: Sent
Subject: Complete with Docusign: Gordian Contract 102424.pdf	
Source Envelope:	
Document Pages: 92	Signatures: 0
Certificate Pages: 4	Initials: 0
AutoNav: Enabled	Envelope Originator:
Envelopeld Stamping: Enabled	Sheila Christoffersen
Time Zone: (UTC-06:00) Central Time (US & Canada)	202 12th Street NE
	P.O. Box 219
	Staples, MN 56479
	Sheila.Christoffersen@sourcewell-mn.gov
	IP Address: 184.99.153.6

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1/14/2025 3:54:46 PM	Sheila.Christoffersen@sourcewell-mn.gov	
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Storage Appliance Status: Connected	Pool: Sourcewell.	Location: DocuSign

Signer Events

Signature	Timestamp
Sophia Jang	Sent: 1/14/2025 3:56:29 PM
s.jang@gordian.com	Viewed: 1/14/2025 7:36:47 PM
Security Level: Email, Account Authentication (None)	

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 Accepted: 1/14/2025 7:36:47 PM
 ID: 3d5da4ab-e09f-4cbb-97ee-4cac9d1759a4

Jeremy Schwartz
 Jeremy.Schwartz@sourcewell-mn.gov
 Security Level: Email, Account Authentication (None)

Electronic Record and Signature Disclosure:
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 ID: d6fa9aed-f21f-44ec-9b66-05a55b79fea7

In Person Signer Events	Signature	Timestamp
Editor Delivery Events	Status	Timestamp
Agent Delivery Events	Status	Timestamp
Intermediary Delivery Events	Status	Timestamp
Certified Delivery Events	Status	Timestamp
Carbon Copy Events	Status	Timestamp
Witness Events	Signature	Timestamp
Notary Events	Signature	Timestamp
Envelope Summary Events	Status	Timestamps
Envelope Sent	Hashed/Encrypted	1/14/2025 3:56:29 PM
Payment Events	Status	Timestamps
Electronic Record and Signature Disclosure		

ELECTRONIC RECORD AND SIGNATURE DISCLOSURE

From time to time, Sourcewell (we, us or Company) may be required by law to provide to you certain written notices or disclosures. Described below are the terms and conditions for providing to you such notices and disclosures electronically through the DocuSign, Inc. (DocuSign) electronic signing system. Please read the information below carefully and thoroughly, and if you can access this information electronically to your satisfaction and agree to these terms and conditions, please confirm your agreement by clicking the 'I agree' button at the bottom of this document.

Getting paper copies

At any time, you may request from us a paper copy of any record provided or made available electronically to you by us. You will have the ability to download and print documents we send to you through the DocuSign system during and immediately after signing session and, if you elect to create a DocuSign signer account, you may access them for a limited period of time (usually 30 days) after such documents are first sent to you. After such time, if you wish for us to send you paper copies of any such documents from our office to you, you will be charged a \$0.25 per-page fee. You may request delivery of such paper copies from us by following the procedure described below.

Withdrawing your consent

If you decide to receive notices and disclosures from us electronically, you may at any time change your mind and tell us that thereafter you want to receive required notices and disclosures only in paper format. How you must inform us of your decision to receive future notices and disclosure in paper format and withdraw your consent to receive notices and disclosures electronically is described below.

Consequences of changing your mind

If you elect to receive required notices and disclosures only in paper format, it will slow the speed at which we can complete certain steps in transactions with you and delivering services to you because we will need first to send the required notices or disclosures to you in paper format, and then wait until we receive back from you your acknowledgment of your receipt of such paper notices or disclosures. To indicate to us that you are changing your mind, you must withdraw your consent using the DocuSign 'Withdraw Consent' form on the signing page of a DocuSign envelope instead of signing it. This will indicate to us that you have withdrawn your consent to receive required notices and disclosures electronically from us and you will no longer be able to use the DocuSign system to receive required notices and consents electronically from us or to sign electronically documents from us.

All notices and disclosures will be sent to you electronically

Unless you tell us otherwise in accordance with the procedures described herein, we will provide electronically to you through the DocuSign system all required notices, disclosures, authorizations, acknowledgements, and other documents that are required to be provided or made available to you during the course of our relationship with you. To reduce the chance of you inadvertently not receiving any notice or disclosure, we prefer to provide all of the required notices and disclosures to you by the same method and to the same address that you have given us. Thus, you can receive all the disclosures and notices electronically or in paper format through the paper mail delivery system. If you do not agree with this process, please let us know as described below. Please also see the paragraph immediately above that describes the consequences of your electing not to receive delivery of the notices and disclosures electronically from us.

How to contact Sourcewell:

You may contact us to let us know of your changes as to how we may contact you electronically, to request paper copies of certain information from us, and to withdraw your prior consent to receive notices and disclosures electronically as follows:

To contact us by email send messages to: Legal@sourcewell-mn.gov

To advise Sourcewell of your new e-mail address

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