

The City Of

CRESTVIEW
FLORIDA

Request for Proposal

23-01-12-PS

**Computerized Maintenance
Management System Software and
Implementation**

December 2022

1. Background/Purpose of Request for Proposal - 23-01-12-PS

The City of Crestview Florida (City) invites qualified software vendors (Vendor) to submit proposals for software and future implementation of a new Computerized Maintenance Management System (CMMS) for the City's Public Services Department. The CMMS should be capable of being used by all functions within the Public Services Department (Utility Maintenance and Sewer, Streets and Storm Water Management, Fleet Maintenance, Water, Engineering, Collection and Distribution). The CMMS should be a commercially available software with successful performance record with other local governments of similar size and scope as the City.

Sealed bids will be received by the City of Crestview, at the City Clerk's Office 198 N. Wilson Street, Crestview, Florida 32536; until **January 12, 2023, at 2:00 p.m. local time**. Any bids received after the above time will not be accepted under any circumstances. Any uncertainty regarding the time a bid is received will be resolved against the bidder. Bid opening will be promptly at 2:00 p.m. local time on January 12, 2023, at the City Hall Council Chambers, 198 N. Wilson Street, Crestview, Florida 32536, at which time all bids received will be publicly opened and read aloud.

Proposals will be reviewed and a shortlist generated with anticipated schedule listed below. All questions and communications regarding the request should be directed to Maryanne Schrader via email at cityclerk@cityofcrestview.org. Shortlisted vendors will then be requested to participate in demonstrations showing their software's capabilities.

Table 1-1. Proposed CMMS RFP and Vendor Demonstration Timeline

Release of Request for Proposal (RFP)	Thursday, December 8, 2022
Deadline for Submission of Questions	Wednesday, December 14, 2022
Responses to Questions Emailed to all Vendors	Monday, December 19, 2022
Deadline for RFP Submittal	Thursday, January 12, 2023, 2:00 PM CST
Notification of Selection for Vendor Demonstration	Thursday, February 2, 2023
Vendor Demonstration	Week of March 6, 2023

2. Submittal Requirements

General requirements for the submittal are listed below:

- 1) Four (4) hard copies of the entire submittal package.
- 2) All text files should be in PDF.
- 3) The total page count should not exceed 10 double-sided pages or 20 single-sided pages, which include the mandatory Attachments A and B.
- 4) Page size and format:
 - a) 8.5 x 11-inch paper.
 - b) Pages must be numbered sequentially.
 - c) Font should be 12 point in size.
- 5) Hard copy submittals should be mailed to the following contact name and address:
City Clerk's Office - 23-01-12-PS
198 N. Wilson Street
Crestview, Florida 32536

- 6) As described in further detail below, following each Attachment, please answer each question as completely as possible. There is no need to retype the question. If any question(s) cannot be answered, please state the Section Letter/Number and reason why no answer is being provided.

3. Project Background

The City's Public Services Department is a multi-divisional department consisting of 7 divisions and approximately 45 employees. The Public Services Department serves approximately 27,000 citizens and manages and maintains an estimated 140 miles of streets, roadways and alleys, 2 bridges, street lighting, one wastewater treatment plant (WWTP), 8 groundwater wells, 77 lift stations, and 6 elevated water storage tanks. The WWTP is maintained and operated by a third party and will not be included in the CMMS Implementation. The Public Services Department oversees all maintenance of the City's fleet of work vehicles, police cruisers, heavy construction equipment, and management of all vehicle lease programs. The Public Services Department also provides management and oversight for the Solid Waste Contractor for the City of Crestview, removing over 26 thousand tons of garbage, trash, and recyclables each year.

The desired functionality in a CMMS for the City is detailed in Table 2 below:

Table 2. Desired Functionality Summary of City of Crestview Computerized Maintenance Management System Needs

Desired Functionality	
SCADA	<ul style="list-style-type: none"> • CMMS must interface with Current Omnisite SCADA software, Crystal Ball, Guard Dog, and Panhandle
GIS	<ul style="list-style-type: none"> • CMMS must interface with GIS • Map all assets (must include meters with meter #s) • Ability to overlay neighborhoods, council districts, on work order maps • Ability to display work order information more easily, asset history, and map work orders • Visibility to view where and what employees are working on each day
Work Orders / PM's	<ul style="list-style-type: none"> • Work order system for assignment of duties and tasks – both scheduled and non-scheduled events • Work order details to include time, materials, manpower and equipment utilized for each job when complete • Ability to search by area for similar work orders in proximity of working crew • Mobile app capabilities • Automatic notifications for work order status – due, overdue, etc. • Ability to track work order status from creation to close out, for scheduled (PM) and nonscheduled items, and for work order to be created by multiple users • Ability to attach photos and documents to work order • Ability to track and manage inspection of signs/streetlights • Ability to schedule and track street sweeping and ROW Tree trimming • Visibility to when maintenance activities are scheduled and completed as well as charting and trend analysis. • Ability to schedule projects and view project scheduling • Ability to receive customer work orders in the new CMMS from City Hall • Fleet Maintenance Pro does not interact with other systems and prefer to replace with new CMMS
Asset Register	<ul style="list-style-type: none"> • All assets stored in one system
Reporting	<ul style="list-style-type: none"> • Comprehensive reporting structure that has report building tools, graphs, etc. • Ability to generate reports of signs/streetlights • Ability to report material costs and quantity purchased over time by vendor as well as material pricing by vendor.
Vendor	<ul style="list-style-type: none"> • Ability for H5 to translate to the new CMMS so customer work orders can be handled the same as internal and flow from H5 into new CMMS to assign, track, and close
Contracts/Permits	<ul style="list-style-type: none"> • Plan/permit review and tracking • Ability for CMMS to interact with MGO

The City does not currently have an established asset hierarchy or asset registry. Assets are tracked in multiple systems and will be compiled into one asset registry prior to implementation. During implementation, the historical asset data, preventative maintenance data, corrective maintenance data, geographic information system (GIS) data, and other relevant information will be migrated into the new CMMS. Asset information is currently stored in Naviline HTML5, Fleet Maintenance Pro, Simple Signs,

ArcGIS, various excel spreadsheets, logbooks, email, and as paper copies. The City currently manages their assets through multiple platforms as detailed in Table 3 below.

Table 3 City of Crestview Existing Systems - Asset Related Activity

Software	Functionality
Central Square NaviLine HTML5	<ul style="list-style-type: none"> • Purchasing, Accounting, Receiving, and Invoicing • Customer Work Orders • Mobile application not currently being used
UtiliSphere (irthNet)	<ul style="list-style-type: none"> • Website used for utility locates • Tickets resulting from 811 requests (utility locates)
Fleet Maintenance Pro	<ul style="list-style-type: none"> • Vehicle Maintenance Work Orders • Vehicle Maintenance PM function not currently being used • Asset tracking not currently being used, rather tracked through Microsoft Excel
Sensus Field Logic Tools	<ul style="list-style-type: none"> • Satellite read meters, installed and maintained by Public Services • Uses cell phone application to reset Meter Transceiver Units (MXU's)
Tokay	<ul style="list-style-type: none"> • Backflow preventer testing • Backflows are owned by customer and are not considered an asset
Weblink2	<ul style="list-style-type: none"> • System vehicle maintenance uses for Advanced Auto Parts to identify spare parts needed for vehicles
Fuel Cards	<ul style="list-style-type: none"> • Tracks fuel consumption for Enterprise fleet which is leased
Omnisite	<ul style="list-style-type: none"> • Telemetry on Lift Stations (Guard Dog and Panhandle) • SCADA (Crystal Ball)
MyGovernmentOnline	<ul style="list-style-type: none"> • Tracks plan reviews from City Hall • Permitting
CivicPlus	<ul style="list-style-type: none"> • Residents can use to log complaints (e.g., potholes) • HR Software • It is desired to eliminate customer complaint side, not HR side
Simple Signs	<ul style="list-style-type: none"> • Sign Maintenance Program • Tracking of sign inspections • Tracking about 3,000 sign inspections in this system currently
Excel	<ul style="list-style-type: none"> • Warehouse Inventory • Fleet and equipment asset inventory • Reporting
ESRI ArcGIS	<ul style="list-style-type: none"> • Asset locations and details
Laserfiche	<ul style="list-style-type: none"> • Records management repository

4. Scope of Services Requested

Project Management

The Vendor shall be responsible for overall project management with assistance from the City, as required. The Vendor shall provide project management services including establishing a written project management plan, establishing and updating regularly appropriate project controls for budget and schedule, updating the City on project status regularly (monthly at a minimum), facilitating project status meetings, managing implementation team staff, and ensuring project quality. The vendor shall plan the work, including establishment of project teams, roles, expectations, and schedules.

Software Installation

The Vendor shall lead the installation of the cloud-based software. Vendor may assume the City will provide the required hardware and environments. The software installation will include mobile devices as well as desktop.

Design

The vendor shall develop functional and technical specifications based on the City requirements and understand integration and data migration requirements and strategy. The Vendor shall work with the City to identify the asset and work history data to be migrated to the new CMMS software.

The City will review the asset data to ensure data quality prior to migrating into the new CMMS Software. The following assumptions are made regarding asset migration:

- An asset hierarchy will be developed by the City.
- A complete asset list will be developed by the City.
- Work Order history will be migrated under this scope and the City will have identified the data to be migrated.
- Certain assets have associated documents. The selected vendor is responsible for linking and loading the associated documents into the CMMS that are provided by the City.

The Vendor shall review and document key processes including interface and modifications requirements to ensure that functional requirements are met. The Vendor shall make recommendations to existing business processes based on industry best practices. Work management and inventory process will be reviewed and configured to minimize modifications or customizations to the application. Elements include establishing appropriate user security, start centers, and screen changes based on the City needs. The results should be mutually agreeable to both the City and Vendor as a result of the Business Process Analysis. Overall goals will be to streamline data entry, scheduling, and performance reporting.

The Vendor shall be required to provide reporting templates. A total of 10 reports will be configured to meet the City needs beyond the out of the box templates.

Vendor shall review and define the integration requirements and develop integration architecture and development plans. The Vendor should be able to integrate with existing applications provided in Table D-1 and allow for flexibility to integrate with new technology for future business improvement goals. Within the scope of work of interfaces, the Vendor shall be responsible for subcontracting services from other providers of the applications with which the CMMS system should interface.

Configure

Vendor shall develop functional and technical specifications based on the City requirements, including integration and data migration requirements and strategy. The Vendor shall lead the configuration of the system. Knowledge transfer to key users shall occur to ensure that the City can configure the system in the future to meet changing business requirements, without requiring Vendor assistance.

The vendor shall develop, integrate, and Unit Test all applicable components of the solution, including workflows, integrations, data migration processes, and report development. The phase would include:

- Configure CMMS Software according to specifications
- Implement existing workflows/business processes into the CMMS Software and develop additional workflows
- Develop integrations
- Conduct data migration
- Develop reports
- Create training materials
- Conduct onsite training

Verify / Test

The Vendor shall be required to provide test plans, including load and acceptance testing plans, to assist The City with testing the system. The Vendor shall provide on-site assistance during the testing phases to assist users as required. Testing shall include core functionality and integration testing for The City's required interfaces and modifications. Inability of the Vendor to provide 100 percent of contract required functionality and resolution of system issues will be grounds to reject and terminate the project.

The Vendor shall conduct System, Integration, and User Acceptance testing of all components of the solution. The phase would include:

- System testing
- Integration testing
- User Acceptance testing
- Regression testing

Deploy

The Vendor is required to be on-site for Go Live with an approved deployment plan. The vendor shall also develop a transition plan, so that the implementation is sustainable by The City staff beyond the end of this initial implementation.

The Vendor shall move the system into production and provide support during the transition period. The phase would include:

- Deployment Plan
- Go-Live/Roll-out in accordance with the plan
- On-site support - End user
- On-site support –Technical

Stabilize / Sustainment

The Vendor is required to provide 5 days of Post Live support to resolve any issues. Final acceptance and sign-off of the system will be completed at the end of Post Live and will be the maintenance effective date. In addition, the Vendor shall allow for up to 80 hours of longer-term support, beyond the 5 day Post-Live period.

The implementation vendor shall update all documents developed during the project to reflect "as-built" conditions prior to The City's final acceptance and payment of final invoice.

This phase would include:

- Support
- Final Acceptance and Sign-Off

Training

The Vendor shall be required to provide a training plan which will include on-site, hands-on training, and will provide electronic documentation (current user manuals) for core team members and end users. Train-the-trainer type training is preferred. Proposed training hours shall ensure 100 percent knowledge transfer of all functions to the City. The Vendor shall coordinate with the City to provide training when deemed most beneficial to the trainees by the City.

Specific training sessions required are:

- CMMS System Awareness Training, open to any staff, to explain in detail the functionality of the modules purchased.
 - o Up to 60 participants
- CMMS Fundamentals, End User training

- Anticipate 4 sessions with up to 15 participants
- System Administrator Training
 - Anticipate 1 session with up to 4 participants

Response Requirements

1. QUALIFICATION AND EXPERIENCE FOR IMPLEMENTATION (NO MORE THAN 5 PAGES)

Provide a brief company history, including year established and number of years Offeror has been providing CMMS services as outlined in this RFP. If the company has been involved in any reorganization, acquisition, or merger within the past 3 years, please provide details and indicate any company name changes and reason(s).

Describe your experiences and key milestones. Describe the Offeror's basic understanding of the services identified within the RFP. Include a statement regarding the availability of the Offeror/project team. Provide an overview of the Offeror's services and expertise. Provide a narrative list of past and ongoing related experience in providing services for wastewater utility CMMS applications that the firm has completed or begun in the last three years.

2. PROPOSED PROJECT TEAM, QUALIFICATIONS, AND EXPERIENCE (NO MORE THAN 6 PAGES, EXCLUDING RESUMES)

List the project manager's and key individuals' past and ongoing experience, and briefly discuss how this experience relates to the Offeror's approach and proposed approach. Describe the project team. Provide an attachment or appendix with resumes including applicable experience for the project manager and key individuals (maximum 1 page per person). Please detail proposed CMMS related certifications and training completed.

3. PROJECT APPROACH AND SCHEDULE (NO MORE THAN 6 PAGES, EXCLUDING ATTACHMENTS AND THE SECTION QUESTIONS BELOW)

Describe the Offeror's approach and methodology to successful CMMS implementation. Identify anticipated challenges associated with implementing the software. The Scope of Work presented in this RFP is intended as a guide and not a prescriptive definition of the requirements unless listed as a "must" or "shall" requirement, but at a minimum the Offeror's response should address the services requested. Proposed variations from the Scope of Work should be addressed. In addition, to responding to Attachment A, please provide answers to the following questions:

Section A.) Software Vendor Profile

- 1) Per Attachment A, provide five references (company, key contact name, email and telephone) of clients with comparable locations of business operations, number of users, and data volume. Provide a representative list of customers who currently use the CMMS software proposed in your response to this RFQ with emphasis on customers in the water/wastewater utility sector.
- 2) For doing business in Florida, state your company's official registered name, mailing address, main telephone number, toll-free numbers, and web address.

Section B.) Pricing, Terms, and Conditions

- 1) As shown in Attachment B, describe the initial licensing, including rough order-of-magnitude (ROM) licensing of the CMMS software. Software as a Service (SaaS) is preferred.
- 2) Please provide pricing structure for all needed software, including “add-ons” or modules.
- 3) Describe extraneous costs. For instance, are there “add-ons” that would be required to meet the functionality criteria provided in this RFP?
- 4) Describe the proposed software’s historical contract increases as a percentage over time.
- 5) Describe how software updates are communicated and if there are any additional costs for updates to software.
- 6) Detail the costs for the CMMS services outlined in this RFP response, itemized by 5-year cost summary and ROM cost estimate for integration, implementation, training, and support. Costs should be based on 60 users operating in utility functions (Utility Maintenance and Sewer, Streets and Storm Water Management, Fleet Maintenance, Water, Engineering, Collection and Distribution). In addition, please provide a user basis cost breakdown to include additional users over 60 if needed.

Section C) IT Infrastructure

- 1) Does your hosted solution require use of the City’s infrastructure and personnel?
- 2) Discuss what browsers (and versions) are supported. Are any browser plug-ins required to use your software?
- 3) What are the hardware requirements of a client PC and server using your application?
- 4) Can you describe the frequency of updates to your software for major release and patches?
- 5) How far back do you typically support older versions of your software?
- 6) Is your software compatible with Windows patches and service packs? What is your lag time for testing compatibility with Windows patches? Who is responsible for testing this compatibility?

Section D) Interfaces

- 1) Describe your experience interfacing with Central Square NaviLine HTML5 for customer service requests, purchasing, receiving, invoicing, and managing inventory levels.
- 2) What are your capabilities interfacing with ESRI ArcGIS?
- 3) What are your capabilities interfacing with ESRI ArcGIS via mobile application?
- 4) Describe your capabilities interfacing with Omnisite Crystal Ball SCADA and Guard Dog Telemetry and Panhandle Telemetry.
- 5) Describe your capabilities interfacing with WEX Fuel cards. What other fuel card systems have you interfaced with to track fuel consumption?

Table D-1 Interfaces

Software	Interface Status
Central Square NaviLine HTML5	<ul style="list-style-type: none">• Required• Bi-directional interface
ESRI ArcGIS	<ul style="list-style-type: none">• Required• One-way interface
Fuel Cards	<ul style="list-style-type: none">• Required• One-way interface
MyGovernmentOnline	<ul style="list-style-type: none">• Desired• One-way interface
Omnisite	<ul style="list-style-type: none">• Required• One-way interface
UtiliSphere (irthNet)	<ul style="list-style-type: none">• Desired• One-way interface
Laserfiche	<ul style="list-style-type: none">• One-way interface

Attachment A
Software Vendor Profile

Attachment A – Reference Clients

Proposer must complete reference profile in its entirety. Another format is acceptable as long as the content is complete. References will be asked to provide end user contacts.

Reference Client 1:

Contact's Name & Title: _____

Contact's Phone #: _____

E-Mail Address: _____

Type of Service Performed: _____

Type of Industry: _____

Length of Service (consecutive years): _____

Reference Client 2:

Contact's Name & Title: _____

Contact's Phone #: _____

E-Mail Address: _____

Type of Service Performed: _____

Type of Industry: _____

Length of Service (consecutive years) _____

Reference Client 3:

Contact's Name & Title: _____

Contact's Phone #: _____

E-Mail Address: _____

Type of Service Performed: _____

Type of Industry: _____

Length of Service (consecutive years): _____

Reference Client 4:

Contact's Name & Title: _____

Contact's Phone #: _____

E-Mail Address: _____

Type of Service Performed: _____

Type of Industry: _____

Length of Service (consecutive years): _____

Reference Client 5:

Contact's Name & Title: _____

Contact's Phone #: _____

E-Mail Address: _____

Type of Service Performed: _____

Type of Industry: _____

Length of Service (consecutive years): _____

Attachment B
Estimated Costs

Attachment B – Estimated Costs

Proposer must complete in its entirety in the format below.

A) 5-Year Cost Summary – Table B.1

Provide a 5-year estimated cost summary for the system you are proposing for a total of 60 users using the table provided below.

Table B.1

Licensing Approach	User Basis (min 60)	Additional User Cost	Initial Year Cost	Licensing & Maintenance Cost				Total 5 Year Cost
				Year 2	Year 3	Year 4	Year 5	
Cloud Based								

Additional costs items should be listed below:

B) Implementation and Integration Cost Estimate - Table B.2

Proposer must complete in its entirety in the format provided below. Please refer to Section 2, Services Requested, for a breakdown of requirements for each line item in Table B.2. All travel costs should be included in the costs detailed in Table B.2.

Indicate if implementation, integration and/or training services are self-performed or provided by a third-party. Costs provided below are not binding and are intended for obtaining rough order of magnitude costs for proposed software solution. Costs basis is for 60 users (wastewater utility provider).

Cost of complete implementation is estimated at \$ _____.

Table B.2

Project Task	ROM Cost
Project Management	\$
Software Installation	\$
Design	\$
Configure	\$
Verify/Test	\$
Deploy	\$
Stabilize/Sustainment	\$
Training	\$
Total ROM Cost Estimate	\$

Additional costs items should be listed and estimated below: