

Consulting Services Proposal to Evaluate & Select a Computerized Maintenance Management System (CMMS)

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Proposed Consulting Services

Per Capitol Area Development Authority's (CADA) request, FM360, LLC is pleased to submit a proposal for professional services to assist with the determination, evaluation, and selection of a computerized maintenance management system (CMMS). A CMMS can and should be a very powerful tool for efficiently managing day-to-day operations and determining data-driven, business decisions that benefit CADA, its tenants, and the State in the near and long-term. FM360 writes and speaks frequently on this topic and encourages you to peruse the related articles and webinar that are available at the bottom of our CMMS Consulting webpage (<http://fm360consulting.com/cmms-consulting/>).

FM360 is proposing that we begin with a needs analysis, which is comprised of stakeholder interviews, workflow analysis/optimization, document review, and assessment of the various data sets available. The outcome of this needs analysis will be user requirements that CADA can use as their RFP specifications. Additionally, FM360 will draft a CMMS system functionality checklist that the respondents will complete and return with their submission. We will support the solicitation process by providing a recommended list of CMMS and by being available to answer questions from potential respondents. Once the responses are received, FM360 will review the submissions, measure them against the evaluation matrix (created by FM360 that marries back to the specifications) and provide quantitative data and our recommendations to CADA. We will coordinate with the top three candidates, as selected by CADA, to provide demonstrations, following the script drafted by FM360. The script will mimic the desired workflows and processes so that CADA stakeholders/users can assess the ease and function of the respective systems. The output of these demonstrations will be a quantitative and qualitative evaluation that will lead to the selection of a provider.

Defining requirements and selecting the best "tool" is the first key step. Implementation is the next critical milestone that often determines the long-term success of the software and the facility management organization. Thus, implementation needs to be carefully thought out and planned. FM360 will partner with CADA and the selected provider to develop a realistic, phased schedule and then walk through the process, acting as the owner's agent to ensure the software ultimately delivers as required. We will also conduct periodic analysis to ensure the data is complete and useful and provide coaching to staff so that the full value of the CMMS is realized.

Below is the proposed first phase of the process, which includes the needs analysis, CMMS selection & recommendation, and pre-implementation. Additionally, a high-level estimate for implementation support is provided.



Computerized Maintenance Management System (CMMS) Needs Analysis

FM360 will conduct interviews with the ten stakeholders identified by CADA and review available data and documentation to discern the following. The interviews can be conducted during an on-site visit and/or remotely via teleconference.

- **Vision/Mission/Goals**
 - Organizational vision/mission, business drivers, and state requirements
 - Overarching desired outcomes, such as stewardship, transparency, accountability, and efficiency
 - Obstacles or inhibitors to successful implementation
- **Performance Management & Metrics**
 - Existing performance metrics and how collected & communicated
 - Organizational strengths and growth opportunities
 - Metrics and outputs desired/required by stakeholders
 - Customer/tenant satisfaction by reviewing sample of surveys or summary report, if available
- **Operations & Maintenance Services & Practices**
 - The various services provided by CADA
 - Services performed in-house versus outsourced
 - Contract management practices
 - Employed maintenance strategies
 - General condition of facilities and systems
 - Security and safety policies & practices
- **Workflow Management & Processes**
 - Various means by which work is communicated and generated
 - Current and desired feedback mechanisms
 - Required approval processes
 - Work scheduling, coordination, and dispatching
 - Process for completing, closing, and documenting work
 - Chargeback and invoicing requirements, if applicable
- **Mobile Application**
 - Potential users
 - Probability of adoption
 - Desired functions (e.g. barcoding, work timer, meter readings, etc.)
 - Acceptable/desired platforms, size, durability, cost, etc.
- **Data Reporting & Integration**
 - Data/reports desired or required by other departments and/or systems (e.g. financial, human resources, compliance, etc.)
 - Desired dashboards and reports (including frequency and format) of the various stakeholders
 - Training & staff development management
- **Existing Data**
 - Quality of existing data, including if it is comprehensive and trustworthy
 - Completeness of data, such as facility, system, and equipment inventory



- Format and availability of data to export
- Capital forecasting
- Electronic copies of drawings, O&M manuals, documents, etc.

CMMS User Requirements & RFP Preparation

Based upon the above needs analysis, FM360 would provide the following:

- **User Requirements**
 - Draft CMMS user requirements that could act as the system specifications to include with the request for proposal; provide to CADA for review
 - FM360 will incorporate feedback from CADA and provide final revision
- **CMMS System Functionality Checklist**
 - Create a matrix listing each of the functions as identified in the user requirements; functions will reference user requirement section numbers
 - Functions are labeled as “required” or “preferred”
 - Checklist will accompany RFP with instructions for respondents to complete and return with their submission; this will increase the efficiency and quantitative evaluation of the applications

CMMS Evaluation & Selection

FM360 will assist with the review of submissions, provide recommendations, and support CADA as desired, to ensure the right product is selected for the organization.

- **Potential CMMS Software Providers**
 - Based upon the user requirements, research and recommend possible providers
 - Provide list of potential respondents along with respective contact information
- **Solicitation for Proposals**
 - Answer questions from respondents and assist with solicitation as desired
- **CMMS Evaluation & Recommendation**
 - Develop CMMS provider evaluation matrix that marries back to requirements
 - Review respondent submissions (assume 6)
 - Apply evaluation criteria and provide feedback
 - Participate in online demonstration of top 3 selected providers and provide feedback/recommendation



CMMS Pre-Implementation

The pre-implementation proposed tasking could run concurrently with the solicitation of proposals. This will help shorten the duration needed to implement the selected software, as data gathering and editing can begin prior to provider selection.

- **Prep for CMMS Implementation**

- Work with staff to identify preliminary data to collect for CMMS; assist with template development
- Work with selected provider to develop preliminary implementation plan; attend kick-off meeting remotely

CMMS Implementation

Once a system is selected, FM360 will partner with CADA and the provider to develop a realistic, phased implementation schedule. We will walk through the implementation process, acting as the owner's agent, to ensure the software and provider meet the desired outcome. FM360 can also provide on-going support, conducting remote evaluation of the system use and data quality, and providing further recommendations for optimizing operations and maximizing the value of the CMMS. A preliminary estimate is provided for budgeting purposes. A more detailed plan can be developed once a CMMS is selected.

- **Project Management**

- Maintain and manage implementation plan
- Coordinate efforts with selected provider
- Keep CADA apprised of progress, issues, etc.

- **CMMS Configuration**

- Assist with development, defining, and implementation of various user defined fields, such as:
 - Failure codes
 - Priorities/criticalities
 - Workflows/rules
 - Categories
 - Status, sub-status, and discovery modes
 - Service types
 - Common responses
- Assist with identifying and implementing desired reports, key performance indicators, and dashboards

- **System Roll-Out/Implementation**

- Participate in online training (as provided by vendor)
- Draft Standard Operating Procedures (SOPs) for:
 - User Administration
 - Work Order Management, including creating, dispatching, scheduling, completing & closing
 - Submitting Service Requests (customer is target audience)
 - Document Management in CMMS (including drawings, procedures, etc.)



- Commission/test workflows, mobile device(s), service request form, etc.
- **Performance Management & Support** (for 6 months from implementation)
 - Provide coaching to staff and management to fully realize the value of the CMMS
 - Review CMMS performance data monthly and provide recommendations & feedback
 - Provide insight regarding best practices

Deliverables

Capitol Area Development Authority will receive the following deliverables:

- CMMS User Requirements to use as specifications for the request for proposal
- CMMS System Functionality Checklist to be completed and submitted by respondents
- Recommended CMMS provider list
- Respondent Evaluation Matrix
- CMMS recommendations & feedback
- Preliminary CMMS implementation plan
- Facility Management Program Assessment Summary Report which will identify additional recommendations for furthering CADA's program and maximizing the value of the CMMS (including recommended key performance indicators)

Proposed Schedule

The large majority of the work will be performed remotely, mitigating travel expenses. The interviews and data gathering will occur as part of a two-day site visit. The on-site visit is tentatively planned for December 14th & 15th. Assuming such, FM360 anticipates that a CMMS could be selected by the end of January (depending upon CADA's procurement policies) with implementation beginning shortly thereafter.



Cost for Proposed Services

Service	Est. Cost
CMMS Needs Analysis & User Requirements (Estimated 50 Hours) <ul style="list-style-type: none">• Kick-off meeting• Interviews (10)• Data & Documentation Review• User Requirements• System Functionality Checklist• Assessment Summary Report <i>*One two-day site visit is planned</i>	\$7500*
CMMS Evaluation & Selection (Estimated 54 Hours) <ul style="list-style-type: none">• Provide recommended list of providers• Assist with proposal solicitation• Evaluation & Recommendation	\$8100
CMMS Pre-Implementation (Estimated 12 Hours) <ul style="list-style-type: none">• Prep for Implementation	\$1800
CMMS Implementation Support (Estimated 200 Hours**) <ul style="list-style-type: none">• Project Management• CMMS configuration/setup assistance• System roll-out/implementation• Performance management & support <i>*Anticipate two two-day site visits during implementation</i>	\$30,000*
Additional Consulting Services	\$150/Hr

***Plus Travel Expenses (estimated at \$1500/trip for two-day site visit)**

Assumptions & Exceptions

- Stakeholders and staff will be available for interviews, as necessary
- CADA will provide electronic copies of processes, practices, etc. where available
- CADA will provide sample of data collected in Maximo or access to Maximo
- CADA will lead procurement efforts and provide contract administration for CMMS
- Location, asset, and maintenance tasking data is assumed to be significantly complete, accurate, and readily exportable from Maximo into an Excel compatible format
- Expended hours and agreed-to expenses will be invoiced monthly and due upon receipt



Acceptance of Proposal

Please sign and date with acceptance of this proposal.

Capitol Area Development Authority

Date

John Rimer, CFM - President, FM360, LLC

Date