



Fulton County Board of Commissioners
Agenda Item Summary

17-0536

BOC Meeting Date
6/21/2017

Requesting Agency

Real Estate and Asset Management

Commission Districts Affected

All Districts

Requested Action *(Identify appropriate Action or Motion, purpose, cost, timeframe, etc.)*

Request approval to award contract without competition - Department of Real Estate and Asset Management, Maximo Upgrade and Expansion, in the amount of \$316,017.00, with M2Consulting, Inc., (Newnan, GA) to upgrade and expand the existing County-owned GIX/Maximo system for all County facilities. Effective upon BOC approval.

Requirement for Board Action *(Cite specific Board policy, statute or code requirement)*

In accordance with Purchasing Code Section 102-384, after conducting a good faith review, and the Purchasing Department has determined that there is only one source available for the required supply, service, or construction item, the request shall be forwarded to the Board of Commissioners for approval.

Is this Item related to a Strategic Priority Area? *(If yes, note strategic priority area below)*

Yes All People trust government is efficient, effective, and fiscally sound

Is this a purchasing item?

Yes

Summary & Background

(First sentence includes Agency recommendation. Provide an executive summary of the action that gives an overview of the relevant details for the item.)

Scope of Work: The Department of Real Estate and Asset Management (DREAM) requests the approval to award without competition the upgrade and expansion of the existing County-owned computerized maintenance management system, IBM Maximo v.7.5 license in use at the Fulton County Jail to version 7.6. The scope of work will also include the expansion of the aforementioned software platform to include all facilities in DREAM's Central and Greater Fulton service areas. Also included in the scope of work is the implementation of Maximo for Transportation to be used by DREAM to manage and track performance of the County's fleet operations. The full scope of work will allow DREAM to establish and track performance indicators for all facets of DREAM's facility maintenance and fleet operations. Maximo will provide real time performance data that will drive significant improvements in both service delivery and customer service.

In 2004, Fulton County procured Maximo version 5.x to track and manage facility operations at the Fulton County Jail. At that time the software platform was physically hosted on a County-owned network server. In early 2007, the server suffered a critical failure resulting in the loss of all jail maintenance performance data. The decision was made to procure and updated version of the software as a part of the base service cost of the jail maintenance contract. More importantly, the decision was made to have a third party consultant host the platform to protect the integrity of the County's maintenance data due to Federal Consent Order requirements. The current County-owned version of Maximo will no longer be supported by IBM after April 2018 which makes the

Agency Director Approval		County Manager's Approval
Typed Name and Title	Phone	
Felicia Strong-Whitaker, Director	(404) 612-5800	
Signature	Date	

Revised 03/12/09 (Previous versions are obsolete)

aforementioned upgrade of the system necessary. DREAM has been utilizing CityWorks as its maintenance management system. CityWorks does not have necessary functionality to effectively track maintenance operational performance in the vertically build environment.

The Scope of Work is as follows:

I. Upgrade to existing FCJ Instance of Maximo from v7.5.x to v7.6.x

- 1) Create a Development Instance of Maximo on their Hosting Platform
- 2) Download IBM and SYCLO Installation media on Customer's behalf
- 3) Upgrade to 7.6.x in DEV
- 4) Test & rehearse
- 5) Make necessary changes (minor) to existing 13 customer reports.
- 6) Schedule Go-Live
- 7) Stand-Up a new 7.6.x PROD Server
- 8) Upgrade during OFF hours
- 9) Test functionality
- 10) Release to customer

II. Extend Maximo to the Central & Greater Regions' Facilities (which will also include Maximo for Transportation).

- 1) Copy FCJ PROD to DEV
- 2) M2 will document a discovery session with Fulton County SME's on the service delivery processes they use and which will need to be automated.
- 3) M2 will establish and maintain a Project Plan and weekly conference call.
- 4) Objects to Load
 1. Assets
 2. Locations (3) levels
 3. Workorders
 - Persons/Labor
 - Domains
- 5) Configure Maximo for Sites
- 6) Mapping CityWorks to Maximo
 - a. Domain List CrossReference
- 7) Configuring MaxArchive to Load the objects
- 8) Create Reconciliation Queries
- 9) Load Into DEV
 - Create workflow like the FCJ
- 10) Unit Test
- 11) User Review
- 12) M2 will map the PM process to be enabled at Fulton County. M2 will configure the OOB PM and related modules to support and automate that process.
- 13) M2 will tailor the program to meet the template already established at FCJ.
- 14) We will incorporate Fulton County Job Plans (JP's) that are suitably formatted and include the necessary data.
- 15) M2 will furnish Job Plans as required from our library including PM tasks, frequencies and durations to supplement yours when required.
- 16) M2 will select and assign the appropriate JP to each asset across the portfolio.

Continued

- 17) We will load and test the PM process
- 18) M2 will test the program with the client to validate functionality and data.
- 19) M2 will create a basic Start Center for each role
- 20) M2 will provide training by role to users (four (4) days)
- 21) M2 will support user acceptance testing
- 22) M2 will deploy a custom Self Service Requestor Start-Center. This will be self-registering and not integrated with Active Directory. This will enhance your end user experience giving them the ability to create and view the status of their individual service requests.
- 23) We will provide Go-Live support on-site for up to two days.

Community Impact: Improve service delivery and performance tracking.

Department Recommendation: DREAM recommends the approval of the request.

Project Implications: The Department will not be able to track the delivery of services for our facilities organization.

Community Issues/Concerns: None that the Department is aware of.

Department Issues/Concerns: None that the Department is aware of.

History of BOC Agenda Item: Upgrade and expansion of existing system

Contract & Compliance Information	<i>(Provide Contractor and Subcontractor details.)</i>
--	--

17-0536

Solicitation Information	NON-MFBE	MBE	FBE	TOTAL
No. Bid Notices Sent:				
No. Bids Received:				
Total Contract Value	\$316,017.00			
Total M/FBE Values	.			
Total Prime Value	\$316,017.00			
Fiscal Impact / Funding Source	<i>(Include projected cost, approved budget amount and account number, source of funds, and any future funding requirements.)</i>			
500-520-5200-F019 - CMF Archibus MAXIMO - \$230,611.00; 500-520-5200-F038 – Upholstery Cleaning - \$27,406.00; 500-520-5200-F048 – Jail Cooling Towers - \$58,000.00				
Exhibits Attached	<i>(Provide copies of originals, number exhibits consecutively, and label all exhibits in the upper right corner.)</i>			
Exhibit 1: M2 Consulting, Inc. Proposal Exhibit 2: Contractor Performance Memo – M2 Consulting, Inc.				
Source of Additional Information	<i>(Type Name, Title, Agency and Phone)</i>			
Ellis G. Kirby, LEED AP, CEM, CEFP, Director, DREAM, (404) 612-5919				

Agency Director Approval		County Manager's Approval
Typed Name and Title	Phone	
Signature	Date	
Felicia Strong-Whitaker, Director	(404) 612-5800	

Revised 03/12/09 (Previous versions are obsolete)

Continued

Procurement**Contract Attached:**
No**Previous Contracts:**
Yes**Solicitation Number:**
.**Submitting Agency:**
Department of Real
Estate and Asset
Management**Staff Contact:**
Trudie E. Carmichael**Contact Phone:**
404-612-5929**Description: Upgrade and expansion of existing County-owned GIS/Maximo system.****FINANCIAL SUMMARY****Total Contract Value:**

Original Approved Amount: .
 Previous Adjustments: .
 This Request: \$316,017.00
 TOTAL: \$316,017.00

MBE/FBE Participation:

Amount: 0.00 %: .
 Amount: . %: .
 Amount: . %: .
 Amount: . %: .

Grant Information Summary:

Amount Requested: . ☐ Cash
 Match Required: . ☐ In-Kind
 Start Date: . ☐ Approval to Award
 End Date: . ☐ Apply & Accept
 Match Account \$: .

Funding Line 1:

500-520-5200-F019 -
\$230,611.00

Funding Line 2:

500-520-5200-F038 -
\$27,406.00

Funding Line 3:

500-520-5200-F048 -
\$58,000.00

Funding Line 4:

.

KEY CONTRACT TERMS**Start Date:**

6/15/2017

End Date:

12/31/2017

Cost Adjustment:

.

Renewal/Extension Terms:

None

ROUTING & APPROVALS

(Do not edit below this line)

X	Originating Department:	Kirby, Ellis	Date: 6/9/2017
X	County Attorney:	Stewart, Denval	Date: 6/14/2017
X	Purchasing/Contract Compliance:	Strong-Whitaker, Felicia	Date: 6/14/2017
X	Finance/Budget Analyst/Grants Admin:	Jones, Monica	Date: 6/13/2017
.	Grants Management:	.	Date: .
X	County Manager:	Anderson, Dick	Date: 6/15/2017



Fulton County Department of Real Estate
& Asset Management

May 25, 2017

RE: MAXIMO Facilities Expansion

CONFIDENTIAL

M2 has proposed expanding Maximo to the entire Facilities portfolio. We have also proposed opportunities to expand the GIS/Maximo capability and Maximo for Transportation.

Each option is based on delivering a turnkey, to Go-Live, solution for a guaranteed not to exceed price (GNTE).

We can assure you that not only is M2 a quality and proven services provider, that this is the lowest cost to deliver these solutions by a significant amount. We offer this approach in keeping with M2's frugal ten year relationship with Fulton County and delivering Maximo services.

All resources will be provided by M2 and only Maximo Certified Consultants will be used. The final solution will adhere to the operating functionality at the Fulton County Jail (FCJ), with all the same operating and automation features. The intention is to add facilities and assets to the FJC Implementation. Proper hierarchy will be established that reorganizes the expanded portfolio. The new users will not initially use a third party mobile application as they do at FCJ.

The End of Support (EOS) for Maximo 7.5.x was announced this week and it is 4/18/2018. We propose to upgrade the FCJ Maximo Instance to version 7.6.x prior to expanding the portfolio. This will allow you to avoid a much larger project(s) down the road. Upon completion everything will be current.

Scope of Work (SOW)

- I. Upgrade to existing FCJ Instance of Maximo from v7.5.x to v7.6.x
 - 1) Create a Development Instance of Maximo on our Hosting Platform
 - 2) Download IBM and SYCLO Installation media on Customer's behalf
 - 3) Upgrade to 7.6.x in DEV
 - 4) Test & rehearse
 - 5) Make necessary changes (minor) to existing 13 customer reports.
 - 6) Schedule Go-Live
 - 7) Stand-Up a new 7.6.x PROD Server

- 8) Upgrade during OFF hours
- 9) Test functionality
- 10) Release to customer

II. Extend Maximo to the Central & Greater Regions' Facilities

- 1) Copy FCJ PROD to DEV
- 2) M2 will document a discovery session with Fulton County SME's on the service delivery processes they use and which will need to be automated.
- 3) M2 will establish and maintain a Project Plan and weekly conference call.
- 4) Objects to Load
 1. Assets
 2. Locations (3) levels
 3. Workorders
 - Persons/Labor
 - Domains
- 5) Configure Maximo for Sites
- 6) Mapping CityWorks to Maximo
 - a. Domain List CrossReference
- 7) Configuring MaxArchive to Load the objects
- 8) Create Reconciliation Queries
- 9) Load Into DEV
 - Create workflow like the FCJ
- 10) Unit Test
- 11) User Review
- 12) M2 will map the PM process to be enabled at Fulton County. M2 will configure the OOB PM and related modules to support and automate that process.
- 13) M2 will tailor the program to meet the template already established at FCJ.
- 14) We will incorporate Fulton County Job Plans (JP's) that are suitably formatted and include the necessary data.
- 15) M2 will furnish Job Plans as required from our library including PM tasks, frequencies and durations to supplement yours when required.
- 16) M2 will select and assign the appropriate JP to each asset across the portfolio.
- 17) We will load and test the PM process
- 18) M2 will test the program with the client to validate functionality and data.
- 19) M2 will create a basic Start Center for each role
- 20) M2 will provide training by role to users (4 days)
- 21) M2 will support user acceptance testing
- 22) M2 will deploy a custom Self Service Requestor Start-Center. This will be self-registering and not integrated with Active Directory. This will enhance your end user experience giving them the ability to create and view the status of their individual service requests.
- 23) We will provide Go-Live support on-site for up to two days.

Cost for the above services complete:

\$93,499

Plus any out of pocket travel expenses. We anticipate less than \$1000.00

Software

M2 has determined how many additional users are required to cover all regions and crafts.

- 6 Primary/Authorized (All Modules)
6 at \$4672 ea = \$28,032
- 18 Limited/Secondary (3 Modules)
18 at \$2344 ea = \$42,192

Total Software Investment

\$64,712 *with discount

Total Maximo Facilities Project Expansion Cost

\$158,211

Customer Responsibility

Customer will provide all data required in the format(s) provided by M2.

Add Option I

Implement Maximo MAPS. Fulton County will be responsible for the MAP provider e.g. Google, Bing. This is not intended to integrate with ESRI for that purpose.

M2 will provide functionality to:

- Identify marked locations on a map
- Ability to see records associated with those locations
- Include Asset, Location and Work Order Data

You can extend public maps so that users can view and work with records associated with location. This approach does not necessitate new software or an Integration with ESRI.

Cost to implement maps in Maximo:

\$17,860

Add Option 2

Turnkey Implementation, Maximo for Transportation. All aforementioned Project activities are included.

Scope of Work (SOW)

1. Project Initiation, Planning
2. Core Team Immersion Training
3. Maximo Requirements & Business Process Review
4. User Roles Definition (Security & Training Purposes)
5. Maximo Application Design
6. Training Plan Development

7. Maximo Configuration
8. Workflow Configuration
9. Data Loading
10. Maximo Training Material Development
11. Maximo End User Classroom Training
12. User Acceptance & System Testing Support
13. Maximo Integration to E. J. Ward System Development
14. Go-Live Preparations, Cutover, and Post-Production Support

Cost to Implement Maximo for Transportation:

\$79,534

Out of pocket travel expenses are estimated at less than \$3000

Maximo for Transportation Software

- 2 Primary/Authorized Users
2 at \$6248 ea = \$12,496
- 5 Limited/Secondary Users
5 at \$3920 ea = \$19,600
- 4 Express Users
4 at \$880 ea = \$3,520

Total Software Investment \$32,000* with discount

Total Cost for Maximo for Transportation:

\$111,534

M2 can offer a 5% discount if all options are released at once.

M2 will determine payment terms with customer

Timeline for Maximo Upgrade and Expansion - 120 days

Timeline for Maximo Transportation - 90 days (concurrent)

After acceptance M2 will provide on-going Application Hosting and Support for the new users.

New Users to be Hosted will be added at the current rates.

Primary - \$130 ea month

Limited - \$60 ea month

Express - \$40 ea month

Hosting for 12 months \$28,412

GRAND TOTAL ALL SERVICES INCLUDING DISCOUNT \$316,017

We will waive any new set-up costs.

If you need any additional information please advise.

Rick Bevington

President

M2 Consulting, Inc.

678-854-0382



INTEROFFICE MEMORANDUM

Ellis G. Kirby, LEED AP, CEM, CFP, Director
Department of Real Estate and Asset Management
Phone: (404) 612-5919
Fax: (404) 612-1766

TO: Felicia Strong-Whitaker, Director, Purchasing & Contract Compliance

FROM: Ellis G. Kirby, Director *EGK*

DATE: May 26, 2017

SUBJECT: Contractor Performance Report (CPR) Memorandum –
M2 Consulting, Inc.

The Contractor listed below has never provided any professional goods or services for the Department of Real Estate and Asset Management (DREAM):

PROJECT: Maximo Upgrade and Expansion
PROJECT #: Sole Source
CONTRACTOR: M2 Consulting, Inc.
29 Tower Way
Suite 1014
Newnan, GA 30265
POC: Rick Bevington, President
PHONE: (678) 854-0382

If you need additional information, please contact Trudie E. Carmichael at 404-612-5929.

EGK/tec

Attachment

cc: Joseph Davis, Assistant Director, DREAM
Harry Jordan, Contract Administration Supervisor
File

"Whatever It Takes!"