

CITY OF HIGH POINT

AGENDA ITEM



Title: CMMS Needs Assessment & Procurement Support
HDR, Inc.

Robby Stone – Interim Public Services Director

From: Derrick Boone – Public Services Asst. Director

Meeting Date: February 21, 2022

Public Hearing: N/A

Advertising Date: N/A

Advertised By: N/A

Attachments: A) HDR Proposal

PURPOSE:

To contract with HDR, Inc. to provide a needs assessment and procurement support for a computerized maintenance management system (CMMS).

BACKGROUND:

A computerized maintenance management system (CMMS) provides data and tools for making sound business decisions about the operation, maintenance, and replacement of the City's public infrastructure assets. The Public Services Department currently utilizes two different work order / CMMS systems and neither system interfaces with Cayenta, which is the City's customer service portal. The intent of the Public Services Department is to purchase a CMMS / Work Order software that will meet the needs of all 16 divisions and interface with other software that the City currently utilizes (Cayenta, Lawson, SCADA, Arc GIS, Fleet Maintenance, etc.). HDR Inc. will develop a roadmap of the steps required for the Public Services Department to select and implement the most suitable CMMS, including documentation of functional requirements, criteria for software package selection, and suggesting an implementation plan and estimated costs.

BUDGET IMPACT:

Funds for this project are available in the 2021-2022 Budget.

RECOMMENDATION / ACTION REQUESTED:

The Public Services Department recommends approval and asks for the Council to award the professional engineering services to HDR Inc. in the amount of \$98,000.



January 26, 2022

Mr. Robbie Stone, PE & Mr. Derek Boone
City of High Point
Public Services Department
211 S Hamilton Street, Suite 206
High Point, NC 27261

RE: MSA Supplemental Agreement Scope of Services: CMMS Needs Assessment & Procurement Support

Dear Mr. Robbie Stone, PE & Derek Boone,

Please find attached the scope of services for the CMMS Needs Assessment & Procurement Support, to be conducted for the Public Services Department. This scope can be executed as a supplemental agreement to HDR's Master Services Agreement, dated March 29, 2018, with the City.

Please let us know if you have any questions.

Sincerely,
HDR Engineering, Inc. of the Carolinas

Adam Sharpe
Utility Planning Practice Lead

Jonathan Henderson, PE
South Atlantic Area Manager



Scope of Services Supplemental Agreement

Exhibit A

CMMS Needs Assessment & Procurement Support

Introduction

The City of High Point Public Services Department (City) recognizes that implementing a computerized maintenance management system (CMMS) will provide data and tools for making sound business decisions about the operation, maintenance, and replacement of the City's public infrastructure assets. This project will develop a roadmap of the steps required for the City to select and implement the most suitable CMMS, including documentation of functional requirements, criteria for software package selection, and suggesting an implementation plan and estimated costs.

Approach

The HDR Engineering, Inc. of the Carolinas (HDR) team proposes to achieve the City's goals for this project by using industry-proven methodologies; applied by a team with extensive experience accomplishing similar objectives. HDR's proven approach to successful information technology executions has been tailored to achieve the City's goals for this effort. HDR has experience assessing existing maintenance practices, improving business processes, and implementing CMMS technology to support current business requirements and emerging challenges. Our approach to CMMS planning and implementation is based on the following principles:

- Our work is aligned with the client's business directions
- Our recommendations are practical and implementable
- Our plans are flexible to support future needs
- Our assessments apply industry-leading standards and best practices
- We focus on improving and integrating your business processes
- We work closely with client staff and other stakeholders
- Our commitment to providing quality services is paramount

Scope of Services

Task 1: CMMS NEEDS ASSESSMENT

1.1 PROJECT INITIATION

HDR will initiate this project by facilitating a Project Initiation Workshop at which participating City staff members will receive training on relevant asset and maintenance management best practices. Staff's understanding of these principles – which have been established by respected industry sources – will facilitate their contribution to the project and build support for the resulting plans. This workshop will last up to 3 hours.

HDR will also submit a Request for Background Information. The City-provided background information will help HDR to execute the project as efficiently as possible. In addition, the HDR



Project Manager will meet with the City's Project Manager to coordinate schedules and finalize other project administration details.

1.2 ASSESS BUSINESS NEEDS

During this Task, HDR will work closely with the City's staff to become familiar with the organization's needs for maintenance management data and tools. This will include assessing the City's current maintenance management objectives, business practices, workflows, procedures, roles and responsibilities, reporting, and service commitments.

HDR will conduct a combination of workshops with key staff, walkthroughs, high-level business process analyses, and benchmark comparisons with industry best practices. Up to four (4) meetings of two (2) hours each will be held, resulting in the identification of business requirements, opportunities to improve processes, and emerging management challenges facing the organization. HDR will also become familiar with the City's existing information resources (including applications, data, integrations, hardware, networks, system software, staff, and training) that support – or could potentially support – maintenance management activities. Our assessment will consider the extent to which users' technology needs are currently being fulfilled, along with requirements for applying technology in the future to serve the City's maintenance management business objectives and future challenges.

1.3 REVIEW WORKSHOP

HDR will compile its findings and meet with the City's project team in a workshop to discuss the path forward. Specific topics will include the following:

- Reviewing and obtaining consensus on key information system objectives
- Reviewing and prioritizing high level business requirements
- Suitable software products and differentiators
- City selection criteria, procurement requirements, and standards

1.4 FUNCTIONAL REQUIREMENTS QUESTIONNAIRE

Using our specialized templates and checklists of CMMS functionality, HDR will facilitate workshops to compile business requirements in sufficient detail to identify the most advantageous potential CMMS packages for the City. These specific, prioritized functional and technical requirements will follow the major business elements (e.g., service requests, work orders, inspections, inventory, asset registry, reporting, etc.) in a CMMS package. The resulting requirements questionnaire will be suitable for incorporation into the City's standard templates to produce a Request for Proposal (RFP).

HDR encourages broad involvement in these workshops by staff and management representatives, to begin building ownership in the new system. Up to four (4) meetings of three (3) hours each will be held with Public Services Department staff and up to two (2) meetings of three (3) hours each with City IT staff, resulting in the identification of all the CMMS functional and technical requirements, to be carried forward in the procurement process.



1.5 CMMS IMPLEMENTATION PLAN

A step-by-step CMMS Implementation Plan (or Roadmap) will be developed that addresses the following topics:

- CMMS Objectives
- Prerequisite data gathering and scrubbing
- Selection considerations and preferences
- Functional and technical requirements
- Potential implementation phasing
- Deployment activities and potential transition support
- Estimates of probable cost
- Recommended schedule

Using the Implementation Plan schedule, the cost estimates will be compiled by Fiscal Year.

The City's project team will review the preliminary CMMS Implementation Plan and provide comments to HDR. The final CMMS Implementation Plan will incorporate responses to staff's comments and suggestions. HDR will be available to make one presentation of the recommendations to City management, as needed.

TASK 1 DELIVERABLES:

- Project Initiation Workshop and Agenda (1.1)
- Review Workshop and Agenda (1.3)
- Functional and Technical Requirements (1.4)
- Preliminary CMMS Implementation Plan (1.5)
- Final CMMS Implementation Plan (1.5)

Task 2: Procurement Support

2.1 RFP DEVELOPMENT & RELEASE

HDR will support the project team in finalizing selection criteria and weighting and incorporating the functional and technical requirements into a Request for Proposal (RFP). A mailing list of CMMS software vendors which could potentially meet the City's CMMS needs will also be provided to the City's purchasing professionals. In addition, HDR will provide cost forms and instructions to be included in the RFP, thus promoting uniform responses, and simplifying compilation of the results.

2.2 PROPOSAL EVALUATION

HDR will provide technical support during the CMMS proposal evaluation and selection process. These services will be in support of the City's formal procurement processes and will be conducted in accordance with the City's procurement standards.

These anticipated support activities include the following:

- Compiling quantitative results from proposal functionality questionnaires
- Compiling and comparing proposal cost data
- Assessing technical aspects of the proposals



- Identifying exceptions, red flags, and needed clarifications
- Developing demonstration scripts and participating in scripted demonstrations of short-listed software systems
- Performing telephone reference checks of finalist vendors
- Facilitating site visits to users of finalist products
- Providing industry knowledge and insights

2.3 CMMS SELECTION SUPPORT

HDR will support and document final CMMS selection. This includes developing recommendations to City staff about most suitable solutions and supporting the final decision-making process. In addition, HDR will support the City in identifying the specific scope and terms for the final procurement package. These terms will include key vendor assurances, implementation support services, and other City protections as determined through the CMMS needs assessment and procurement support process.

TASK 2 DELIVERABLES:

- RFP Documentation and Content (2.1)
- Proposal Evaluation Summary (2.2)
- CMMS Selection Summary (2.3)

Schedule

The term for the scope of services in approximately 6 months from notice to proceed. Completion of Task 1 will occur approximately 3 months from notice to proceed. Completion of Task 2 will occur approximately 3 months from the completion of Task 1.

Compensation

Compensation to HDR for the scope of services shall be for a lump sum value of \$98,000. A breakdown of fees by task and subtasks is presented in Table 1.

Table 1 Project Fee

Task	Labor (\$)	Expenses (\$)	Total (\$)
Task 1.1 – Project Management & Initiation	\$8,000	\$300	\$8,300
Task 1.2 – Assess Business Needs	\$8,500	\$300	\$8,800
Task 1.3 – Review Workshop	\$6,700	\$300	\$7,000
Task 1.4 – Functional Requirements Questionnaire	\$23,800	\$300	\$24,100
Task 1.5 - CMMS Implementation Plan	\$17,800	\$300	\$18,100
Subtotal: Task 1 - CMMS Needs Assessment	\$64,800	\$1,500	\$66,300
Task 2.1 – RFP Development & Release	\$8,500	\$300	\$8,800
Task 2.2 – Proposal Evaluation	\$13,400	\$300	\$13,700
Task 2.3 – CMMS Selection Support	\$8,900	\$300	\$9,200
Subtotal: Task 2 - Procurement Support	\$30,800	\$900	\$31,700
Project Total	\$95,600	\$2,400	\$98,000