



ADMINISTRATION COMMITTEE

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Agenda Report

File #: 2024-3869

Agenda Date: 10/9/2024

Agenda Item No: 3.

FROM: Robert Thompson, General Manager
Originator: Wally Ritchie, Director of Finance

SUBJECT:

MAXIMO TO MAXIMO APPLICATION SUITE

GENERAL MANAGER'S RECOMMENDATION

RECOMMENDATION: Recommend to the Board of Directors to:

- A. Approve a Professional Services Agreement to Total Resource Management, Inc. to upgrade Maximo to Maximo Application Suite, Specification No. CS-2024-623BD, for a total amount not to exceed \$296,441; and
- B. Approve a contingency of \$44,467 (15%).

BACKGROUND

The Orange County Sanitation District (OC San) has been using IBM Maximo as a Computerized Maintenance and Management System for the last 10 years to maintain and manage all work performed on OC San assets at Plant Nos. 1 and 2, and the Collections System. OC San is currently using version 7.6.1.3 of Maximo. IBM is ending support for this current version in September 2025. IBM is replacing this current version of the standalone application with a newer suite of applications called Maximo Application Suite (MAS). OC San needs to upgrade to the newer Maximo Application Suite to receive continued support and upgrades from IBM.

RELEVANT STANDARDS

- Ensure the public's money is wisely spent
- Maintain a culture of improving efficiency to reduce the cost to provide the current service level or standard
- Protect OC San assets
- Maintain a proactive asset management program

PROBLEM

OC San has been using IBM's Maximo as its Enterprise Asset Management application for the past 10 years. OC San is currently on version 7.6.1.3 of this application. The support for this version by IBM ends in September 2025. IBM is replacing this version of the application with a newer application called Maximo Application Suite. Maximo Application Suite is an integrated suite,

enabling easier access to a full set of asset lifecycle applications. The following are the applications that are part of the Maximo Application Suite:

- Maximo Manage
- Maximo Mobile
- Maximo Monitor
- Maximo Visual Inspection
- Maximo Health
- Maximo Predict
- Maximo Assist

The specific application within the suite that replaces OC San's current version of Maximo is Maximo Manage.

PROPOSED SOLUTION

Upgrade to Maximo Application Suite using Total Resource Management, Inc. so that OC San can receive continued support and upgrades from IBM.

TIMING CONCERNS

Support for current version expires September 2025.

RAMIFICATIONS OF NOT TAKING ACTION

OC San will not be able to receive software support and required updates from IBM.

PRIOR COMMITTEE/BOARD ACTIONS

October 2021 - Approved a Professional Services Agreement to Total Resource Management, Inc. to provide a Maximo Mobile Solution, Specification CS-2021-1257BD, for a total amount not to exceed \$174,722 and approved a contingency of \$26,208 (15%).

June 2019 - Awarded a Professional Consultant Services Agreement to Total Resource Management, Inc. for the procurement of software and services to implement and configure the Transportation Module for Enterprise Asset Management System (IBM Maximo), Specification CS-2018-1003BD, for a total amount not to exceed \$424,10 and approved a contingency of \$42,410 (10%).

ADDITIONAL INFORMATION

An RFP was issued on July 12, 2024, via PlanetBids. Proposals were due on August 14, 2024. OC San received five proposals which are valid for 180 calendar days from the proposal due date.

Prior to receipt of proposals, an Evaluation Team was formed consisting of an OC San Project Manager/Principal Info Tech Analyst with support from a Senior Info Tech Analyst, a Maintenance Supervisor, and a Financial Management Representative. The team was chaired by a Purchasing Representative as a non-voting member. On August 22, 2024, an evaluation kick-off meeting was held with the evaluation team to discuss the policies and procedures of the evaluation process.

Individual scoring was the chosen method of evaluation for this procurement. Members of the team performed an independent review of the proposals and later met as a group with the Buyer to discuss their preliminary scores and discuss any questions/concerns they had. Proposals were evaluated based on the following criteria:

CRITERION	WEIGHT
1. Qualifications of the Firm	30%
2. Proposed Staffing & Project Organization	20%
3. Work Plan	30%
4. Cost	20%

The evaluation team first reviewed and scored the proposals based upon the criteria listed above, other than cost.

Rank	Proposer	Criterion 1 (Max 30%)	Criterion 2 (Max 20%)	Criterion 3 (Max 30%)	Subtotal Score (Max 80%)
1	Total Resource Management , Inc.	27%	15%	25%	67%
2	Sheffield Scientific	18%	15%	20%	53%
3	Bahwan Cybertek	17%	11%	20%	48%
4	Sedin Technologies	14%	13%	17%	44%
5	TommyTQL	10%	5%	7%	22%

All proposals were accompanied by a sealed cost proposal. Only the cost proposal for the highest ranked firm was opened.

COST INFORMATION FOR OPENED PROPOSALS

Rank	Proposer	ORIGINAL COST	BAFO
1	Total Resource Management, Inc.	\$313,000.00	\$296,441.00

CEQA

N/A

FINANCIAL CONSIDERATIONS

This request complies with authority levels of OC San's Purchasing Ordinance. This item has been budgeted (Budget FY 2024-25 and 2025-26, Section 8, Page 90, Computer Equipment) and the budget is sufficient for the recommended action.

ATTACHMENT

The following attachment(s) may be viewed on-line at the OC San website (www.ocsan.gov) with the complete agenda package:

- Draft Professional Services Agreement