



ADMINISTRATION COMMITTEE

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Agenda Report

File #: 2021-1859

Agenda Date: 10/13/2021

Agenda Item No: 2.

FROM: James D. Herberg, General Manager
Originator: Lorenzo Tyner, Assistant General Manager

SUBJECT:

MAXIMO MOBILE SOLUTION FOR WAREHOUSE

GENERAL MANAGER'S RECOMMENDATION

RECOMMENDATION: Recommend to the Board of Directors to:

- A. Approve a Professional Services Agreement to Total Resource Management, Inc. to provide a Maximo Mobile Solution, Specification No. CS-2021-1257BD, for a total amount not to exceed \$174,722; and
- B. Approve a contingency of \$26,208 (15%).

BACKGROUND

The Orange County Sanitation District (OC San) desires to implement a mobile solution for Maximo Warehouse and Inventory Applications. The solution as specified will be capable of providing warehouse and inventory functionality on a mobile device, with software that works seamlessly with existing business rules and logic written using Total Resource Management Rules Manager. Total Resource Management, Inc. (TRM) was selected in accordance with OC San's Request for Proposal (RFP) process. The software for the mobile solution is provided to TRM by a third party, InterPro Solutions. Therefore, in consultation with OC San's General Counsel, a three-party Software Subscription Agreement between TRM, InterPro Solutions, and OC San is included as part of the TRM's Professional Services Agreement. Once TRM completes mobile solution integration, the Software Subscription Agreement will continue between OC San and InterPro Solutions.

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's current warehouse processes lack mobile capability to document the tasks performed, resulting in the following inefficiencies:

- Inconsistent and inefficient documentation of packing slips upon receiving
- Inefficient documentation of item images
- Inability to get electronic signature acknowledgment on material delivery
- Inefficient and time-consuming cycle counting process
- Resource inefficiencies

In addition, the proposed plan for eliminating the physical Plant No. 2 warehouse and replacing it with a remote warehouse will exaggerate these inefficiencies without a proper mobile solution.

PROPOSED SOLUTION

Procure and implement the EZMAX Mobile software proposed by TRM.

TIMING CONCERNS

N/A

RAMIFICATIONS OF NOT TAKING ACTION

OC San will be unable to improve or eliminate inefficiencies in warehouse processes which will be exaggerated with the future elimination of the warehouse at Plant No. 2.

PRIOR COMMITTEE/BOARD ACTIONS

N/A

ADDITIONAL INFORMATION

On July 1, 2021, OC San issued an RFP for a Maximo Mobile Solution for warehouse applications. The following evaluation criteria were described in the RFP and used to determine the most qualified firm.

CRITERION	WEIGHT
1. Qualifications & Experience of Firm	20%
2. Proposed Staffing & Project Organization	20%
3. Work Plan	30%
4. Presentation	10%
5. Cost	20%

The RFP closed on August 4, 2021. OC San received responses from three vendors. The RFP evaluation team consisted of the Purchasing Supervisor, a Data Mgmt. Tech I, a Principal Info Tech Analyst, and a Senior Info Tech Analyst. This RFP used the individual scoring method. The

evaluation team reviewed and scored the proposals based upon the criteria 1, 2, and 3. As one firm had the high score in each of the first three categories, presentations and opening of cost submissions were deemed not necessary, bringing the max score possible to 70%.

Rank	Proposer	Criterion 1 (Max 20%)	Criterion 2 (Max 20%)	Criterion 3 (Max 30%)	Subtotal Score (Max 70%)
1	Total Resource Management, Inc.	19%	18%	27%	64%
2	Sedin Technologies, Inc.	16%	15%	23%	54%
3	3Di, Inc.	12%	12%	15%	39%

Based on these results, staff recommends awarding the Agreement to Total Resource Management, Inc. The term of this Agreement will begin upon effective date of Notice to Proceed.

CEQA

N/A

FINANCIAL CONSIDERATIONS

This request complies with authority levels of OC San's Purchasing Ordinance. This item has been budgeted in the FY2020-21 & 2021-22 Budget, EAM Software & Process Implementation SP-100 (Section 8, Page 83).

<u>Date of Approval</u>	<u>Contract Amount</u>	<u>Contingency</u>
10/27/2021	\$174,722	\$26,208 (15%)

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
- Draft InterPro Solutions Subscription Agreement