

LakeCounty

Purchasing Division

<http://doingbusiness.lakecountyil.gov/>

Lake County will be accepting **only** electronic RFP submissions for Request for Proposal #20008 Computerized Maintenance Management System (CMMS).

Please follow the steps below to upload your electronic RFP Submission:

1. Go to www.lakecountypurchasingportal.com
2. Click on the RFP Number: 20008
3. Click on register for this bid
4. Enter your username and password
5. Under the Submittals section you will be able to upload your bid submittal
 - a. Click on the browse button
 - b. Navigate your computer and select the appropriate file
 - i. Multiple files can be uploaded, each file can be no more than 20 MB
 - ii. Files can also be uploaded as a .zip file
 - c. Click on save submittals
 - d. Close the browser

ALL SUBMITTALS SHOULD BE LABELED ACCORDINGLY. PLEASE USE BELOW LABEL FOR YOUR CONVENIENCE.

<u>BID/RFP No.</u> RFP #20008	Vendor Name: _____
<u>Buyer:</u> Yvette Albarran	Lake County
<u>Bid/RFP Description:</u> Computerized Maintenance Management System (CMMS)	ATTN: PURCHASING DIVISION 18 N. County Street – 9 th Floor
<u>BID/RFP Due Date*:</u> November 24, 2020 at 11:00 a.m.	Waukegan, IL 60085-4350

***Please note: Responses are due at 11:00 a.m. local time on November 24, 2020. Please allow sufficient time for any technical issues you may have and upload your RFP early. Please email Purchasing at purchasing@lakecountyil.gov to receive confirmation that we have successfully received your submissions**

Lake County, Illinois
Request for Proposals # 20008
Computerized Maintenance Management System (CMMS)

This Request for Proposal (RFP) is for the purpose of establishing a contract for the procurement of Computerized Maintenance Management System (CMMS) to assist with managing assets, work orders, inventory, and other workflows for the Lake County Public Works wastewater and water systems.

GENERAL REQUIREMENTS: Proposers are to submit via electronic submission. Submit one (1) marked Original, and one (1) redacted copy that can be used to comply with the Illinois Freedom of Information Act (FOIA). Please refer to the FOIA statute, 5 ILCS 140/1 et seq., and specifically Section 7 therein, for an explanation of the information that may be redacted.

SUBMISSION LOCATION: Proposal are to be submitted via the Lake County Purchasing Portal.

SUBMISSION DATE & TIME: **November 24, 2020, 11:00 a.m. local time**
Proposals received after the time specified will not be opened.

CONTACT / QUESTIONS: Should the proposer require additional information about this RFP, please submit questions on our website at <http://lakecountypurchasingportal.com> by selecting the RFP number and addendum link. Questions may also be submitted via email to purchasing@lakecountyl.gov. All questions shall be submitted no less than seven (7) days prior to the RFP opening date.

CONTENTS: The following sections, including this cover sheet, shall be considered integral to this solicitation.

- *Cover Sheet
- *General Terms and Conditions
- *General Information
- *Submittals
- *Evaluation Criteria
- *Addendum Acknowledgement
- *Proposal Price Sheet
- *General Information Sheet
- *References
- *Sustainability Statement
- *Vendor Disclosure Statement
- *Exhibit A –AS-IS and TO-BE Workflows
- *Exhibit B– Concept for Scheduled Preventive Maintenance Checklists
- *Exhibit C - Software Matrix

If your RFP includes any exceptions, proposers must insert an "X" in the following box indicating a submission with exceptions and provide separately a submission with noted exceptions.

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1. NEGOTIATIONS

Lake County reserves the right to negotiate specifications, terms and conditions, which may be appropriate to the accomplishment of the purpose of this Request for Proposal (RFP).

2. CONFIDENTIALITY

Proposals are subject to the Illinois Freedom of Information Act (FOIA). As such all Proposers responding are asked to submit one redacted copy of their proposal that can be used by the County to respond to any future FOIA requests.

We do not disclose proposals or bids until an award or final selection is made. Accordingly, please restrict your redactions to trade secrets and commercial or financial information where the trade secrets or information are proprietary, privileged or confidential, or where disclosure of the trade secrets or information may cause competitive harm.

If you do not provide a redacted copy, the Purchasing Department will determine what information should be redacted as proprietary, privileged or confidential in response to a FOIA request. A proposer who fails to provide a redacted copy of its proposal waives its right to maintain any claims against Lake County, its agents or employees for disclosure of this information.

3. RESERVED RIGHTS

Lake County reserves the right, at any time and for any reason, to cancel this RFP or any portion thereof, to reject any or all proposals, or to accept an alternate proposal. The County reserves the right to waive any immaterial defect in any proposal. Unless otherwise specified by the Proposer, the County has ninety (90) days to accept. The County may seek clarification from a Proposer at any time. Proposer's failure to respond promptly is cause for rejection. The County may require submission of best and final offers.

4. INCURRED COSTS

Lake County will not be liable for any costs incurred by respondents in replying to this RFP.

5. AWARD

Lake County reserves the right to award this contract based on the evaluation criteria set forth herein. Award shall be made by the Lake County Board to the responsible Proposer determined to be the most qualified and advantageous to the County.

6. ADDITIONAL INFORMATION

Should the Proposer require additional information about this RFP, please submit questions on our website at <http://lakecountypurchasingportal.com> by selecting the RFP number and addendum link. Questions may also be submitted via email to purchasing@lakecountyil.gov. All questions shall be submitted no less than seven (7) days prior to the RFP opening date. ANY and ALL changes to these specifications are valid only if they are included by written Addendum to all Proposers. No interpretation of the meaning of the plans, specifications or other contract documents will be made orally. Failure of any proposer to receive any such addendum or interpretation shall not relieve the Proposer from obligation under this RFP as submitted. All addenda so issued shall become part of the RFP documents. Failure to request an interpretation constitutes a waiver to later claim that ambiguities or misunderstandings

caused a Proposer to improperly submit a proposal.

7. ADDENDUM ACKNOWLEDGEMENT

Any and all changes to the specifications and terms and conditions of this RFP are valid only if they are included by addendum issued by Lake County Purchasing. Proposers shall acknowledge addenda by signing the enclosed Addendum Acknowledgement form. It is the Proposers responsibility to check for addendums, posted on the website at <http://lakecountypurchasingportal.com> prior to the submittal due date. No notification will be sent when addendums are posted unless there is an addendum within three business days of the submittal due date.

8. DISCUSSION OF PROPOSALS AND NEGOTIATION

Lake County may conduct discussions with any Proposer who submits a proposal. During the course of such discussions, the County shall not disclose any information derived from one proposal to any other Proposer. Lake County anticipates conducting negotiations with the successful Proposer. Your proposal should indicate any exceptions taken to this.

9. EXCEPTIONS

Any and all exceptions taken by Proposer to the terms of this RFP are to be identified in writing and included in the list of submittals.

10. CONTRACT TERM

Vendors should provide separate costs for implementation, software and maintenance. Fees for Software Services should commence upon system go-live/product launch into production and will have an initial term of a one (1) year period beginning upon system acceptance. Lake County reserves the right to renew this contract for four (4) additional one (1) year period(s), subject to acceptable performance by the contractor. At the end of any contract term, Lake County reserves the right to extend this contract for a period of sixty (60) days for the purpose of getting a new contract in place. For any year beyond the initial year, this contract is contingent on the appropriation of sufficient funds; no charges shall be assessed for failure of the County to appropriate funds in future contract years.

11. RESPONSIBILITY & DEFAULT

The Proposer shall be required to assume responsibility for all items listed in this RFP. The successful Proposer shall be considered the sole point of contact for purposes of this contract.

12. PURCHASE ORDER AND PAYMENT

The Proposer shall submit an invoice detailing the services and products provided, based on the breakdown of items as listed on the Price Proposal Sheets, and based on the Project Specifications. Invoices shall show the purchase order number and the address where the product or services are provided. Payment shall be made in accordance with the Local Government Prompt Payment Act.

13. INTERPRETATION OR CORRECTION OF REQUEST FOR PROPOSALS

Proposers shall promptly notify the Purchasing Division of any ambiguity, inconsistency or error that they may discover upon examination of the RFP. Interpretation, correction and changes to the RFP will be made by addendum. Interpretation, corrections or changes made in any other manner will not be binding.

14. TAXES

The County is exempt from paying certain Illinois State Taxes.

15. TERMINATION

The County reserves the right to terminate this contract, or any part of this contract, upon thirty (30) days written notice. In case of such termination, the Proposer shall be entitled to receive payment from the County for work completed to date in accordance with the terms and conditions of this contract. In the event that this Contract is terminated due to Proposers default, the County shall be entitled to purchase substitute items and/or services elsewhere and charge the Proposer with any or all losses incurred, including attorney's fees and expenses.

16. INDEPENDENT CONTRACTOR

The Contractor is an independent contractor and no employee or agent of the Contractor shall be deemed for any reason to be an employee or agent of Lake County.

17. NON-DISCRIMINATION

The Proposer shall comply with the Illinois Human Rights Act, 775 ILCS 5/1-101 et seq., as amended and any rules and regulations promulgated in accordance therewith, including, but not limited to the Equal Employment Opportunity Clause, Illinois Administrative Code, Title 44, Part 750 (Appendix A), which is incorporated herein by reference. Furthermore, the Proposer shall comply the Public Works Employment Discrimination Act, 775 ILCS 10/0.01 et seq., as amended.

18. INDEMNIFICATION

The Proposer agrees to indemnify, save harmless and defend Lake County, its agents, servants, and employees, and each of them against and hold it and them harmless from any and all lawsuits, claims, demands, liabilities, losses and expenses, including court costs and attorney's fees, for or on account of any injury to any person, or any death at any time resulting from such injury, or any damage to property, which may arise or which may be alleged to have arisen out of or in connection with the work covered by this contract. The foregoing indemnity shall apply except if such injury, death or damage is caused directly by the willful and wanton conduct of Lake County, its agents, servants, or employees or any other person indemnified hereunder.

19. INSURANCE

The Contractor must obtain, for the Contract term and any extension of it, insurance issued by a company or companies qualified to do business in the State of Illinois with an A.M. Best Rating of at least A-and provide the County with a Certificate of Insurance 15 days before the start of the project, and thereafter annually for contracts/ projects that will last more than one year. Insurance in the following types and amounts is necessary and/or where applicable:

Workers Compensation (Coverage A) and Employers Liability (Coverage B)

Workers Compensation Insurance covering all liability of the Contractor arising under the Worker's Compensation Act and Worker's Occupational Disease Act at limits in accordance with the laws of the State of Illinois. Employers' Liability Insurance shall be maintained to respond to claims for damages because of bodily injury, occupational sickness, or disease or death of the Contractor's employees, with limits listed below:

Employers Liability

- a) Each Accident \$1,000,000
- b) Disease-Policy Limit \$1,000,000
- c) Disease-Each Employee \$1,000,000

Such Insurance shall contain a waiver of subrogation in favor of Lake County.

Commercial General Liability Insurance

In a broad form on an occurrence basis shall be maintained, to include, but not be limited to, coverage for property damage, bodily injury (including death), personal injury and advertising injury in the following coverage forms where exposure exists:

- Premises and Operations
- Independent Contractors
- Products/Completed Operations
- Liability assumed under an Insured Contract/ Contractual Liability
- Personal Injury and Advertising Injury

With limits of liability not less than:

\$ 1,000,000 Each Occurrence

\$ 1,000,000 Products-Completed Operations

\$ 1,000,000 Personal and Advertising injury limit

\$ 2,000,000 General aggregate; the CGL policy shall be endorsed to provide that the General Aggregate limit applies separately to each of the contractor's projects away from premises owned or rented to contractor.

Automobile Liability Insurance (if applicable)

Automobile liability insurance shall be maintained to respond to claims for damages because of bodily injury, death of a person, or property damage arising out of ownership, maintenance, or use of a motor vehicle. This policy shall be written to cover any auto whether owned, leased, hired, or borrowed.

The Contractor's auto liability insurance, as required above, shall be written with limits of insurance not less than the following:

\$ 1,000,000 Combined single Limit (Each Accident)

Professional Liability – Errors and Omissions (if applicable)

The Engineers/Architects/Consultants for the plans of the project shall be written with limits of insurance not less than the following:

\$ 1,000,000 per claim per policy year

Coverage shall be provided for up to three (3) years after project completion. Policy is to be on a primary basis if other professional liability is carried.

Professional Liability – Cyber Liability (if applicable)

Cyber Liability Insurance for property damage to electronic information and/or data; first and third party risks associated with e-business, internet, etc., with limits of insurance not less than the following:

\$ 1,000,000 per occurrence limit

Technology Errors and Omissions (if applicable)

The Contractor's Software Developer and/or IT Consultant for the plans, including developing and implementing technology for Lake County, or of the project, shall be written with limits of insurance not less than the following:

\$ 1,000,000 per occurrence limit

Excess/ Umbrella Liability (if applicable)

The Contractor's Excess/ Umbrella liability insurance shall be written with the umbrella follow form and outline the underlying coverage, limits of insurance will be based on size of project:

\$ 2,000,000 per occurrence limit (minimum, and may be higher depending on the project)

Liability Insurance Conditions

Contractor agrees that with respect to the above required insurance:

- a) The CGL policy shall be endorsed for the general aggregate to apply on a "per Project" basis;
- b) The Contractor's insurance shall be primary in the event of a claim.
- c) Contractor agrees that with respect to the above required insurance, Lake County shall be named as additional insured, including its agents, officers, and employees and be provided with thirty (30) days' notice, in writing by endorsement, of cancellation or material change;
- d) Lake County shall be provided with Certificates of Insurance and endorsements evidencing the above required insurance, prior to commencement of this Contract and thereafter with certificates evidencing renewals or replacements of said policies of insurance at least thirty (30) days prior to the expiration of cancellation of any such policies.
- e) Any hard copies of said Notices and Certificates of Insurance shall be provided to:

Lake County
Purchasing Division
18 N. County 9th Floor
Waukegan, Illinois 60085
Attn: RuthAnne Hall, Lake County Purchasing Agent

Failure to Comply: In the event the Contractor fails to obtain or maintain any insurance coverage required under this agreement, Lake County may purchase such insurance coverage and charge the expense to the Contractor.

20. ASSIGNMENT

The Proposer may not reassign any award made, as the result of this RFP, without prior written consent from the County.

21. JURISDICTION, VENUE, CHOICE OF LAW

This RFP and any contract resulting there from shall be governed by and construed according to the laws of the State of Illinois. Jurisdiction and venue shall be exclusively found in the 19th Judicial Circuit Court, State of Illinois.

22. CHANGE IN STATUS

The Proposer shall notify Lake County immediately of any change in its status resulting from any of the following: (a) Proposer is acquired by another party; (b) Proposer becomes insolvent; (c) Proposer, voluntary or by operation law, becomes subject to the provisions of any chapter of the Bankruptcy Act; (d) Proposer ceases to conduct its operations in normal course of business. Lake County shall have the option to terminate its Agreement with the Proposer immediately on written notice based on any such change in status.

23. DISPUTE RESOLUTION

All issues, claims, or disputes arising out of this Agreement shall be resolved in accordance with the Appeals and Remedies Provisions in Article 9 of the Lake County Purchasing Ordinance.

24. NON-ENFORCEMENT BY THE COUNTY

The Proposer shall not be excused from complying with any of the requirements of the Contract because of any failure on the part of the County, on any one or more occasions, to insist on the Proposer performance or to seek the Proposers compliance with any one or more of said terms or conditions.

25. PRECEDENCE

Where there appears to be variances or conflicts, the following order of precedence shall prevail: Lake County General Terms & Conditions, Lake County Request for Proposal Terms and Conditions, and the Proposal Response.

26. PERSONAL EXAMINATION

Proposers are required to satisfy themselves, by personal examination of the site as to work involved and the difficulties likely to be encountered in the performance of work under this Agreement. No plea of ignorance of conditions that exist now or hereafter, or of any conditions of difficulties that may be encountered in the execution of the work under this Agreement will be accepted as an excuse for failure to or omission on the part of the Proposer to fulfill in every respect all the requirements and specifications, nor will same be accepted as a basis for any claim for extra compensation.

The Proposer is responsible to investigate and gather all relevant and pertinent information prior to submitting a proposal. By submitting a proposal, the Proposer affirms that they have performed all due diligence and are aware of all critical factors that may affect the provision of the services as described in the RFP. Such critical factors may include but are not limited to; location, space, utilities, scope of operations, and any other conditions, which may affect the Proposer operations. No allowance will be made for not being familiar with existing conditions to be encountered.

27. PRICING

See **PROPOSAL PRICE SHEET** for pricing information.

28. PROGRESS PAYMENTS

Lake County shall make periodic payments to the proposer based upon actual progress within 30 days after receipt and approval of invoice. Said payments shall not exceed the amounts shown in the following schedule, and full payments for each task shall not be made until the task is completed and accepted by Lake County.

29. JOINT PURCHASING

The purchase of goods and services pursuant to the terms of this Contract shall also be offered for purchases to be made by other governmental units, as authorized by the Governmental Joint Purchasing Act, 30 ILCS 525/0.01, et seq. (the "Act"). All purchases and payments made under the Act shall be made directly by and between each governmental unit and the successful Proposer. The Proposer agrees that Lake County shall not be responsible in any way for purchase orders or payments made by the other governmental units. The Proposer further agrees that all terms and conditions of this Contract shall continue in full force and effect as to the other governmental units during extended terms. The credit or

liability of each governmental unit shall remain separate and distinct. Disputes between Proposers and governmental units shall be resolved between the immediate parties.

The Proposer and the other governmental units may negotiate such other and further terms and conditions to this Contract ("Other Terms") as individual projects may require. To be effective, other terms shall be reduced to writing and signed by a duly authorized representative of both the successful Proposer and the other governmental unit.

The Proposer shall provide the other governmental units with all required documentation set forth in the solicitation including but not limited to: performance and payment bonds, Certificates of Insurance naming the respective governmental unit as an additional insured, and certified payrolls to the other governmental unit as required.

30. ECONOMIC OPPORTUNITY PROGRAM

Lake County launched a **Buy Local. Build Local. Work Local.** initiative in 2013 to increase the outreach and procurement opportunities for businesses located within Lake County, including women-owned businesses and minority-owned business enterprises (L/W/MBE). The overarching objective is to maximize participation from these businesses in the County's procurement process, in accordance with applicable law. The County will take all necessary and reasonable steps to assure that business enterprises defined as L/W/MBE shall have a fair opportunity to participate in County contracts. As part of its Economic Opportunity Program (EOP) commitment the County will make every effort to achieve the following objectives:

- (a) To ensure nondiscrimination in the award and administration of contracts.
- (b) To create a level playing field on which L/W/MBEs can compete fairly for contracts by providing any necessary training and assistance in bid preparation.
- (c) To ensure that the County's EOP is narrowly tailored in accordance with applicable law.
- (d) To establish a means for firms identifying themselves as L/W/MBEs to register for procurement opportunities and work cooperatively with contracted firms to report on measures that demonstrates the County's commitment to its EOP; and,
- (e) To help remove barriers to the participation of L/W/MBEs through notification of contract opportunities.

Successful Proposers are encouraged to work with Workforce Development to post any and all opportunities for employment on County contracts. Lake County's Workforce Development mission is to foster and ensure the economic prosperity of the Lake County community by maximizing the potential of businesses and workers. As such, Workforce Development provides a key resource for job seekers and employers.

State law mandates an open and competitive bidding process and requires that publicly procured contracts be awarded to the lowest responsible and responsive bidder with no demonstrated preference based on the bidder's location, race and gender.

31. REPORTING REQUIREMENTS FOR AWARDED CONTRACTS

All awarded vendors will identify and report the type of ownership— L/W/MBE, and/or not L/W/MBE for any work that they or their approved subcontractors will perform. In addition, Lake County requests that all awarded vendors provide an accounting of employees assigned throughout the term of the contract in regard to their home address and ethnicity. Lake County may use any data collected to report on potential of businesses and workers benefitting from County contracts.

32. SUSTAINABILITY STATEMENT

Lake County is committed to green and sustainable practices and good environmental stewardship. Consequently, we are asking Proposers to provide a Statement of Sustainability to ensure our Proposer are also incorporating sustainability into their firms' practices. Please complete the Sustainability Statement, included herein, and include it with the Proposer's response.

33. LAKE COUNTY OWNERSHIP OF INFORMATION

All information pertaining to records, property, financial or other information acquired under the scope of this contract shall be strictly confidential and the sole property of Lake County. The Proposer shall return all information to Lake County upon termination, and/or request and shall not utilize any of the information for purposes outside of the scope of this contract or without express approval of Lake County. Upon County request, the Proposer must provide all Lake County data in a documented, standard format.

34. JOINT VENTURES & SUCCESSFUL PROPOSER MERGERS, ACQUISITIONS, DIVESTITURES OR CHANGE IN STRATEGY

In the event a joint venture is proposed, each party to the joint venture must meet all applicable requirements of the RFP. The party submitting the response shall be considered the sole contact for issues relating to this RFP. In the event of a merger, acquisition, divestiture or change in strategy, the successful proposer will state its commitment to continue to provide services.

35. OUT OF POCKET EXPENSES

All out-of-pocket expenses paid by the Proposer during the project will be incurred solely at the Proposers expense.

36. DELIVERY COSTS

The Proposer shall be responsible for the cost of producing, delivering, and if necessary, installing the solution in Lake County's facility in the agreed upon medium.

37. INFORMATION SECURITY

In the process of performing services to Lake County the Proposer may come in contact with information deemed important and proprietary to Lake County. The Proposer agrees that any services performed for Lake County, whether on Lake County premises or not, will meet or exceed Lake County's information security policy and privacy standards. Lake County reserves the right to audit proposer's performance in meeting these standards.

1. INTENT

It is the intent of Lake County Public Works is to solicit proposals from software vendors, systems integrators, implementation partners and/or Value-Added Resellers (VARs) who can demonstrate the organizational, functional and technical capabilities to provide a Computerized Maintenance Management System (CMMS) solution. Lake County Public Works is seeking a CMMS that meets the following requirements:

- A solution specifically for the water/wastewater industry
- Functionalities that would ease current workload and create efficiency
- Assist in managing assets
- Processing work orders
- Managing inventory

2. BACKGROUND

The Lake County Public Works department has approximately 92 employees and owns, operates, and maintains 12 public water systems, eight sanitary sewer systems, five regional interceptor sewer systems, and three water reclamation facilities. Lake County Public Works provides direct water and sewer retail service to 33,000 customers, mostly in the western half of Lake County. Lake County Public Works is part of the service network for another 300,000 residents or approximately 40 percent of the Lake County's total population, through wholesale sewer service contracts with various communities, municipalities or portions of municipalities.

3. CURRENT ENVIRONMENT

Currently general and preventative maintenance is routinely provided to these systems described above by Lake County Public Works staff. A CMMS system is currently in place and is used to address some of the requirements above.

With the growing needs to monitor and report on assets for improved maintenance efficiencies and capital budget decisions, Lake County Public Works has also implemented an Asset Life Cycle program that requires software suited for this purpose. The current program, Oracle Enterprise Asset Management (EAM), was purchased for county-wide use five years ago, but it is unable to store, track or report on detailed asset information. Due to its limitations, most asset information is stored on multiple excel spreadsheets or in the geographic information system (GIS).

The current EAM is unable to connect to the GIS System and does not offer any mobile solutions. The CMMS software system will be used for management and maintenance of approx. 50,000 assets located within the three Lake County Public Works Divisions (Central, North, South).

These assets comprise of but are not limited to the following:

- 13 Water Systems (305 miles of pipe, 10 Reservoirs, 8 Water Towers, 2 Delivery Structures, 31 Wells)
- 8 Sewer Systems (388 miles of pipe, 101 Lift Stations, 5 Pump Stations)
- 3 Water Reclamation Facilities (Mill Creek WRF, Des Plaines WRF, Vernon Hills WRF)

Lake County has developed AS-IS and TO-BE workflow concepts as Exhibit A. The intent of the workflows is to communicate the current County's service operations and concepts for future workflow with a new

CMMS. Lake County anticipates working with the proposer to update the workflows through a series of workshops and integrate the final workflows into Lake County business processes.

Lake County has developed AS-IS and TO-BE workflow concepts for various work areas including:

- Service Requests and Water Meter Servicing
- Corrective Maintenance (work requests)
- Preventative / Predictive Maintenance
- Purchasing Process
 - Procurement Card
 - Inventory
 - Purchase Requisitions
- Capital Planning
- Asset Commissioning
- GIS
- Facility Planning (separate County department)
 - Corrective Maintenance
 - Construction Projects

4. SCOPE OF WORK

The CMMS is expected to have configurable functionality to meet the needs of Lake County and should be capable of interfacing with a variety of systems in place to capture data useful in asset management and maintenance.

- Provide a CMMS that meets the requirements of Lake County Public Works. The requirements are structured into software core functionality requirements and software optional functionality. Each optional item may become part of the core component or could be postponed until funding becomes available. There should be discussion on what optional or future core components would be at all possible, and what the additional estimated cost would be.
- A Project management team should be provided by proposer to oversee the configuration, implementation, and training on the CMMS.
- Workshops should be held initially and as needed for consultation and collaboration with department staff. This will allow the proposer to gain a robust understanding of Lake County Public Works and its workflows.
- Training and documentation shall be provided for staff members that will utilize the CMMS. Different levels of users will require different amounts of training. Proposers should provide their approach to training staff as part of their submitted proposal. The selected proposer should also provide digital user guides as well as technical user guides for administration.
- Following installation, the proposer will provide continuing support and software maintenance. Support will include licenses for users on a continuing basis, customer support and troubleshooting, as well as notification and installation of software upgrades/versions. If further training is needed to learn about updates, or other changes to the program, the contractor will provide this training. If there are additional costs for these upgrade services, they should be included in the proposal.

There will be approximately 69 users of the CMMS system listed below by category:

Administrative	9
Supervisors / Asst. Supervisors	10
Lead Workers	8
Maintenance Utility Workers	16
Maintenance Electricians	3
Plant Operator	18
Plant Mechanic	4
Inventory Manager	1

5. SOFTWARE CORE FUNCTIONALITY REQUIREMENTS

- Commercially available, robust, off the shelf software that is customizable, easy to use, implement and maintain.
- Key Performance Indicators (KPI) – Dashboard or other tools for monitoring and quick informational access displays.
- System Integrations –
 - GIS Integration with Public Works ESRI system. Viewing of asset and activity trends visually.
- Accessibility of data to make changes/additions/deletions to the software.
- Reporting – A large selection of out of box reports as well as flexible reporting tools. Create customized reports without the need for a programming specialist.
- Intuitive features to help quickly find records, such as scanning barcodes, sorting, filtering, and searching.
- Ability to store external files such as images to the asset, work orders, PM's, etc.
- Clean Asset Data Upload – Excel spreadsheet data and GIS data. Establish hierarchies with a setup that allows parent-child relationships between assets.
- Work orders should be able to track materials used, time spent and costing both estimated and actual. Estimates may be needed for contractual work with other municipalities.
- Staff Resource Planning & Utilization - Automated workflow and routing of work orders.
- Create and schedule tasks for Maintenance and Operations Departmental Functions. This includes but is not limited to all PM's and inspections.
- Create electronic fillable forms that will be available for use during PM's, inspections, and other condition assessments. Select form data results should be trackable for charting.
- Asset Life Cycle Management – Capable of storing and tracking specific assets and associated data including attributes, work order history, condition assessment history, inspection history, cost of asset maintenance, and asset life expectancies.
- User-friendly Mobile App (I-pad/Android) for smartphones or tablets. Software should be capable of barcode scanning, work order management and scheduling for field staff. Application should be able to access and synchronize updates back to the CMMS even when cellular signal is temporarily absent.
- Support and maintenance - Software must be an easy to use product and training should be provided along with software instruction manuals that can be used for training. Support should be available when problems/questions arise, and software maintenance should also be provided as necessary.
- Asset Registry – Lake County is working on updates to the asset registry for each location. Lake County will provide the asset registry and attributes for import into the CMMS. Proposer shall provide guidance

on hierarchy, configuration and integration of assets and attributes to support asset management and integration.

- Inventory Management – This will be a discussion item to see how best to handle the accounting side of inventory. Ability to create purchase requisitions for inventory items, create/assign barcodes for easy parts checkout, stock receiving, and materials usage for maintenance, replacement & repair on work orders. Should contain a variety of inventory reports both out of box and customizable.
- Asset Management - Manage asset management including asset condition, reliability and business risk for above ground and below ground assets.
- Scheduled Maintenance – Certain scheduled maintenance tasks by asset are configured and executed in Oracle EAM. Proposer shall coordinate with Lake County on updates to tasks prior to incorporating them into the system.

6. SOFTWARE OPTIONAL OR FUTURE CORE COMPONENT

- Integration with Oracle I-procurement module to capture costs associated with purchasing of various assets and inventory. Oracle I-procurement is tied with the current Oracle Inventory module. Information from the inventory module flows into I-procurement for generating purchase requisitions and tracking order fulfillment/receipt of parts and materials. This may be part of the inventory management requirement depending on discussion recommendations.
- Retrieval of historical data/data conversions from existing Oracle EAM system depending on cost and level of effort required.
- Weather-proof barcoded tags for all assets. This would allow for easy work order creation tied to correct asset.
- Integration with Supervisory Control and Data Acquisition (SCADA) for run times and condition-based maintenance. Configure CMMS to receive runtime information from Wonderware Historian for 200 assets and schedule maintenance based on runtime trigger.
- Integration with CCTV Inspection Software (IT Pipes)
- Forecasting\Scenario Analysis – Using GIS to highlight an area and build a scenario to determine costs and other asset involvement.
- Integration with Accruent VFA Facility Software

7. PROJECT TIMELINE

The County anticipates an implementation rollout strategy commencing in July 2020 with a go-live date of December 2020.

Action Item	Proposed Schedule
Issue RFP	10/27/2020
Proposals Due from Vendors	11/24/2020
Lake County Proposal Review of Proposals	11/24/2020 through 12/11/2020
Shortlist Vendor Demonstrations	Schedule 1/4/2021 through 1/8/2021
Contract Negotiations	1/11/2021 through 1/29/2021
Finance Committee Approval	2/3/2021
County Board Approval	2/9/2021
Contract Execution	2/9/2021

***This timeline is subject to change.**

8. NO MALWARE

The Contractor must warrant and represent that any Software provided by the Contractor to the County under this Contract shall contain no software mechanisms, techniques or devices designed to disrupt, disable or stop its processing of data or other performance in accordance with Specifications.

9. MODIFICATIONS AND ADDITIONAL SERVICES

Any consulting services beyond the scope of the contract that are requested by Lake County shall be provided by the proposer on a time and materials basis. Said billing rates shall remain at those rates until one year from the execution of the Contract at which time the proposer will provide time and materials assistance at the rate charged to other proposer's customers for similar services. Prior to commencement of any additional services, the proposer shall provide a detailed statement of work with a project plan in writing the labor hours, billing rate, description of services and/or work to be performed, the changes or additions to the software implementation, the way in which the systems will function upon completion of the modifications, and the estimated time period for the services to be performed. Lake County shall not be charged for any services until the additional services are approved by Lake County personnel in writing. Only after the proposer receives approval in writing from Lake County will the proposer perform the additional services.

10. COUNTY INFORMATION TECHNOLOGY ENVIRONMENT AND SERVER OPERATING SYSTEM STANDARDS

Lake County is primarily interested in remote hosting the Software at the supplier's hosting site or a subscription-based model (SaaS).

The following includes application systems information relevant to existing Lake County systems:

- Email - Office 365
- GIS - ESRI ArcGIS
Utility Network – New water/sewer model Lake County is planning to migrate to in the upcoming months.
 - Desktop - ArcMap 10.7.1 and ArcGIS Pro v2.5
 - Enterprise – Servers 10.7.1 and SDE (SQL geodatabases) 10.4.1 to 10.7.1
- *Note that we DO NOT have the capacity to support addition applications on our server infrastructure without study. We are currently exploring moving much of our infrastructure to the Cloud, impact unknown.
- Oracle – Current – On-premise Oracle e-Business Suite 12.2.5, Future – reviewing options Oracle IaaS.
- Utility Billing system – Current – On-premise CIS Infinity version 3, Future – Hosted Tyler InCode version 10.
- SCADA – Current - Wonderware Historian and Allmax
- Pipe CCTV - IT Pipes Software
- Facility Department and Public Works – VFA Facility v10.8.7.0 Software for building\structural asset management.
- Permitting and Land Management – Current - Hosted Tyler EnerGov version 2018.1.4.34

DETAILED SUBMITTAL REQUIREMENTS

Proposals should be prepared as simple as possible and provide a straightforward, concise description of the proposed products and services to satisfy the requirements of the RFP. Attention should be given to accuracy, completeness, relevance and clarity of content. The proposal should be organized into the following major sections:

- A. Introduction Material and Executive Summary
- B. Company Background
- C. Scope of Services
- D. Implementation/Project Plan
- E. Subcontractors
- F. Client References
- G. Exceptions to the RFP
- H. Price Proposal
- I. Sustainability Statement
- J. Sample Contract and Service Level Agreement Documents
- K. Value Added Services
- L. Vendor Disclosure Statement
- M. Exhibit C - Software Matrix

A. Introduction Material and Executive Summary

The introductory material must include a title page with the RFP number, subject, name of the Proposer, address, telephone number, e-mail address, the date, a letter of transmittal and a table of contents. The executive summary should be limited to a brief narrative summarizing the proposal.

B. Company Background

In this section provide information about the company so that the County can evaluate the Proposer's stability and ability to support the commitments set forth in the response to this RFP. Information in this section should contain the following information in addition to the General Information Sheet that is also included as an exhibit to this RFP:

- Company name and location of the corporate headquarters and of the nearest office to Lake County.
- The number of years the company has been in business and the number of years the company has been providing system and services to the public sector.
- Include information on the company's customer base, such as the number of public sector clients the company serves, the number of local government clients, and the number of public sector clients in the state.
- Identify if the company serves other industries.
- Include a brief summary of the company's organizational characteristics such as the number of employees, whether the company is privately held, publicly traded, or if it is a subsidiary to a parent company.
- Describe any other business affiliations (e.g., subsidiaries, joint ventures, "soft dollar" arrangements with brokers).

C. Scope of Services

This section of the proposal should include a general discussion of the Proposer's overall understanding of the project and the scope of work. For each task that is identified in the scope of services please identify your firm's approach and response to address the desired service outlined.

D. Implementation/Project Plan

This section should describe the Proposer's implementation and project plan. Proposers should assume that the County will contribute all necessary effort to ensure success in the project.

- Provide methodology for implementation. Methodology should include estimated timeframe, overview of deliverables, assumptions and assumed responsibilities and roles of the County and proposed project team.
- Proposer shall indicate the ability to meet the project timeline. If this timeline cannot be met, please propose a revised timeframe for consideration.
- Provide project team resumes for key members of the implementation team expected to be on the County's project.

E. Subcontractors

Vendor shall list all subcontractors used for this project, along with a detailed description of their contribution/responsibility towards this project.

F. Client References

The County considers references to be an important factor in its decision to award a contract. Proposers should supply references that will be available to speak with the County. Three references should be provided that provided similar type of work completed in the past five years. A reference sheet is included as a submittal as part of this RFP document.

G. Exceptions to the RFP

All requested information to this RFP must be supplied as this document and subsequent proposals submitted help form the basis for a contract with the selected contractor. Proposers may take exception to certain requirements in this RFP. All exceptions shall be clearly identified in this section and written explanation shall include the scope of the exceptions, the ramifications of the exceptions for the County and the descriptions of the advantages or disadvantages to the County as a result of the exception. The County, at its sole discretion, may reject any exceptions or specifications within the proposal.

H. Price Proposal

The price proposal cost sheeting included as part of this proposal shall be completed and returned with your response. Any additional services identified by the proposer shall be delineated separately for the County to consider.

I. Sustainability Statement

Lake County is committed to green and sustainable practices and good environmental stewardship. Consequently, Proposers are asked to provide a Statement of Sustainability to demonstrate that they are also incorporating sustainability into their firms' practices. A Sustainability Statement form is included as part of the RFP. Proposers are asked to provide a clear description of your firm's sustainable practices, policies, or procedures in the following areas: waste minimization, energy efficiency, water efficiency, staff and education.

J. Sample Contract and Service Level Agreement Documents

Proposers should include a sample Contract and Service Level Agreement.

K. Value Added Services

Please include any value-added services your firm provides in your submittal.

L. Vendor Disclosure Statement

Please complete and return the included vendor disclosure statement.

M. Exhibit C – Software Matrix

Please complete and return the included software matrix.

The County will conduct a comprehensive, fair, and impartial evaluation of proposals received in response to this procurement effort. All proposals will be evaluated by how well the proposal satisfies the described/stated needs, rather than how exactly the proposal matches the strictest interpretation of the terminology and design concepts stated herein. Newly emerging technologies, additional features, and the ability of the proposed solutions to adapt will be a consideration.

Evaluation Organization

- a. An Evaluation Committee will be established to score and evaluate the submitted proposals.
- b. The Evaluation Committee may include members from Lake County's departments who have experience with these services. The Committee will be responsible for the proposal evaluation (including corporate reference checks).

Evaluation of the Proposals

Proposals received in response to the RFP must demonstrate that the proposed CMMS program meets the minimum core functionality requirements as presented in the scope of work. Key performance factors are noted below:

- GIS Integration with Public Works ESRI system
- Ease of use (off the shelf, plug and play capability)
- User-friendly Mobile App (I-pad/Android) for smartphones or tablets
- Asset Life Cycle Management
- Create and schedule tasks for Maintenance and Operations Departmental Functions
- Reporting
- Price Proposal

Short List

The evaluation factors will be used to assist the evaluation committee in determining a short list. Proposers will be notified by Lake County if they have been selected for the short list. Please note, Lake County reserves the right to not short list any and all Proposers if it is not in the best interest of the County.

Interview

Lake County reserves the right, as part of the evaluation process, to ask for additional materials, interview, or schedule site visits to any locations serviced by Proposers. Site visits may be scheduled or unscheduled as determined by the County. If applicable, the County shall contact Proposers to arrange an interview.

Additional Investigations

The County reserves the right to make such additional investigations as it deems necessary to establish the competence and financial stability of any firm submitting a proposal.

Best and Final Offer

The County reserves the right to request a Best and Final Offer (BAFO) if additional information or modified terms are necessary for the Evaluation Committee to complete its evaluation and ranking. A BAFO will not be used solely to reduce pricing. If a BAFO is requested, all short-listed proposers, or if the short list process is not used, all qualified Proposers will be provided an opportunity to submit a modified Response. Only one

BAFO request will be issued by the County. The information received from the BAFO will be used by the Evaluation Committee to re-evaluate and re-rank the Proposers.

Intent to Negotiate

The County reserves the right to invite the most qualified proposer to negotiate final terms and conditions, finalize scope clarification and confirm final pricing and payment terms. The information received from the negotiation shall be found in the final contract document. If the parties are unable to negotiate a satisfactory contract the negotiations will be terminated. The County reserves the right to either begin negotiations with the qualified proposer that is next preferred or non-award the request for proposal.



Addendum Acknowledgement RFP #20008

The undersigned acknowledges receipt of the following addendum(s):

ADDENDUM #	SIGNATURE

I have examined and carefully prepared the submittal documentation in detail before submitting my response to Lake County.

Submittal Number: #20008

Company Name: _____

Authorized Representative: _____
Signature

Authorized Representative: _____
Print

Date: _____

It is the vendor's responsibility to check for addendums, posted on the website at <http://lakecountypurchasingportal.com> prior to the submittal due date. No notification will be sent when addendums are posted unless there is an addendum within three business days of the submittal due date.

If the submittal has already been received by Lake County, vendors are required to acknowledge receipt of addendum via email to purchasing@lakecountyil.gov prior to the due date.

Submittals that do not acknowledge addendums may be rejected.

All responses are to be submitted in a sealed envelope. Envelopes are to be clearly marked with required submittal information.

Computerized Maintenance Management System (CMMS)**PROPOSAL PRICE SHEET****October 2020**

The proposer will consider all costs (labor, material, overhead, administration, profit, travel, etc.) associated with providing the services listed in this RFP. (Please attach additional sheets if necessary). The following information shall be submitted with the proposal:

OPTION A – PRICE PROPOSAL FOR A CLOUD HOSTED SOLUTION TO COMPLY WITH RFP AND TECHNICAL REQUIREMENTS

Item No.	Cost Item	Description	Costs (Filled in By Proposer)
1.	Software	Licensing for Software. Note version and any limitation or restrictions. Please base pricing on the following: <ul style="list-style-type: none"> • 69 named users or concurrent user equivalent • 30 mobile devices (if separate cost model for devices) Note alternative pricing model and include costs if applicable. Identify and Include any additional licensing or third-party costs.	\$
		Identify costs for inventory module if additional to CMMS software.	\$
2.	Cloud Hosting	Identify any initial setup costs, annual fees and any other relevant fees.	\$
3.	Implementation Activities	Project management	\$
		Implementation of services described in the RFP including General Information Item 4. Scope of Work and Item 5. Software Core Functional Requirements. Include all elements of delivery such as installation, configuration, integrations, acceptance testing, etc.	\$
4.	Training	Identify costs for training of end-users, power users and administration	\$
5.	Other	Identify per hour costs for custom programming and/or requested enhancements.	\$
		Identify per day costs for on-site, non-maintenance related activity including expenses.	\$
6.	Annual Maintenance and Support Fee	If not included in annual software licensing fee	\$

OPTION B – PRICE PROPOSAL FOR A SOFTWARE AS A SERVICE (SAAS) SOLUTION TO COMPLY WITH RFP AND TECHNICAL REQUIREMENTS

Item No.	Description	Costs (Filled in By Proposer)
1.	Identify costs for Software as a Service (SaaS)	\$

Lake County is interested in a possible SaaS solution. Vendor shall identify costs and implementation that may differ from Option A (cloud hosted solution) in the space below.

Describe SaaS capabilities and any experience, including any problems encountered with remote hosting of all or portions of the proposed Software solution. Include discussion regarding bandwidth requirements, data backups, data security and availability.

ALTERNATE SERVICES – PRICE PROPOSAL ADDITIONAL SERVICES NOT LISTED IN OPTIONS ABOVE

Alternate No.	Description	Costs (Filled in By Proposer)
1.	<p>Alternate Cost Item A – Integration with Oracle I-procurement</p> <p>Concept is to integrate cost information from Oracle I-Procurement to CMMS to allocate purchased costs to assets and inventory.</p> <p>Purchasing will continue to be managed through I-Procurement.</p>	
2.	<p>Alternate Cost Item B – Integration with SCADA Wonderware Historian</p> <p>Concept is to apply runtimes from equipment recorded in SCADA historian to individual assets and trigger scheduled maintenance based on a runtime threshold.</p>	
3.	<p>Alternate Cost Item C – Historical Data Conversions</p> <p>Lake County has work history and cost information related to assets or facilities in Oracle EAM. Retrieve historical data and apply the data to the new CMMS by asset.</p> <p>Export and coordinate data conversions with Lake County to allow an opportunity to realign work history to assets prior to importing.</p>	
4.	<p>Alternate Cost Item D – Weatherproof Bar Coding</p> <p>Provide platform to support bar coding of assets. Lake County will physically apply the bar codes.</p>	
5.	<p>Alternate Cost Item E – Scheduled Maintenance Template Integrations</p> <p>Lake County currently executes several scheduled maintenance tasks with paper checklists. The checklists are included in Exhibit B. Integrate the checklists by asset into scheduled maintenance tasks/checklists in the CMMS. Some fields should be trackable for charting/reporting.</p>	
6.	<p>Alternate Cost Item F – Integration with Collection System CCTV</p> <p>Lake County currently uses IPipes CCTV to televise and inspect the sewer collection system. Integrate with Ipipes to manage the inspection and asset management process in CMMS.</p>	
7.	<p>Alternate Cost Item G – Integration with Accruent VFA Facility Software</p>	

AUTHORIZED NEGOTIATORS:

Name: _____ Phone # _____ Email Address: _____

Name: _____ Phone # _____ Email Address: _____

BUSINESS ORGANIZATION: (check one only)

_____ Sole Proprietor: An individual whose signature is affixed to this proposal.

_____ Partnership: State full names, titles, and addresses of all responsible principals and/or partners on attached sheet.

_____ Corporation: State of incorporation: _____

_____ Non-profit Corporation

_____ 501c3-- U.S. Internal Revenue Code

By signing this proposal document, the proposer hereby certifies that it is not barred from responding on this contract as a result of a violation of either Section 33E-3 or 33E-4 of the Illinois Criminal Code of 1961, as amended.

Business Name

Signature

Title

Print or Type Name

Date

REFERENCES

List below other similar size clients for who you have provided similar services.

Agency Name: _____
Address _____
City, State, Zip Code _____
Telephone Number _____
E-Mail _____
Contact Person _____
Dates of Service _____
of Employees _____

Agency Name: _____
Address _____
City, State, Zip Code _____
Telephone Number _____
E-Mail _____
Contact Person _____
Dates of Service _____
of Employees _____

Agency Name: _____
Address _____
City, State, Zip Code _____
Telephone Number _____
E-Mail _____
Contact Person _____
Dates of Service _____
of Employees _____

Agency Name: _____
Address _____
City, State, Zip Code _____
Telephone Number _____
E-Mail _____
Contact Person _____
Dates of Service _____
of Employees _____

Lake County is committed to green and sustainable practices and good environmental stewardship. Consequently, we are asking proposers to provide a Statement of Sustainability to ensure our proposers are also incorporating sustainability into their firms' practices.

INSTRUCTIONS

On the following Sustainability Statement form, provide a clear description of your firm's sustainable practices, policies, or procedures. These practices may include, but may not be limited to, the following categories and examples:

Waste Minimization within your office or facilities, such as a recycling programs, double-sided copying, electronic internal communications (i.e. memos), use of recycled-content materials and reusable cups, limiting printing, electronic document management, instituting green purchasing policies, using green cleaning supplies and practices, or reducing packaging in materials you procure or supply.

Energy Efficiency within your office, facilities, or firm, such as lighting retrofits, photo-sensor switches for lighting, effective use of daytime lighting, using Energy Star rated appliances or equipment, using an alternative fuel or having efficient fleet policies, an anti-idling policy, or indoor temperature management (i.e. turning the thermostat up in the summer and down in the winter).

Water Efficiency within the office, facilities, or firm, such as faucet or fixture retrofits, switching from individual bottled water to office water coolers or drinking fountains, and installing drought-tolerant landscaping.

Staff encouraged to adopt sustainable practices and supported by your firm through public transit benefits, bicycle accommodations, telecommuting options, support for green seminar attendance, becoming US Green Building Council LEED accredited, or creating an internal "green team."

Education of your staff about green practices, education of your business peers about your green accomplishments, education of your community by your sustainability, or notice of any environmental awards your firm has achieved.

CONTINUE TO NEXT PAGE

Waste Minimization

Energy Efficiency

Water Efficiency

Staff

Education



VENDOR DISCLOSURE STATEMENT

Vendor Name:			
Address:			
Contact Person:		Contact Phone #:	
Bid/RFP/SOI/Contract/Renewal:	RFP #20008		

Vendors wishing to contract with Lake County for goods and services in an amount greater than \$30,000 shall submit this form in advance of award. This disclosure statement is not required for utility companies regulated by the Illinois Commerce Commission or local units of government. Vendors shall disclose:

- A familial relationship between a Lake County elected official, department director, deputy director and manager and owners, principals, executives, officers, account managers or other similar managerial positions of the vendor's company. Familial relationship is defined as a spouse (including civil partner), child, stepchild, parent, stepparent, grandparent, in-laws (including parent, grandparent, sibling, or child), relatives and non-relatives living in the same residence, and offspring born to any aforementioned person.
- All political campaign contributions made by the vendor or an owner, principal, executive, officer, account manager, or other similar managerial position of the vendor to any county board member, county board chair, or countywide elected official within the last five years.

If there is nothing to report in a section, please state none in the appropriate space.

FAMILIAL RELATIONSHIPS

List names and departments/agencies of Lake County employees or public officials with whom owners, principals, or officers of the vendor's company have a familial relationship and the nature of the relationship. Attach additional pages as necessary. (Provide all names or state none in the space below. Do not leave blank.)

Name and Department/Agency of Lake County Employee/Public Official		Familial Relationship

CAMPAIGN CONTRIBUTIONS

List campaign contributions that have been made within the last five years that exceed \$150 annually. Attach additional pages as necessary. (Provide all names or state none in the space below. Do not leave blank.)

		Description (e.g., cash, type of item, in-kind service, etc.)		
Recipient	Donor		Amount/Value	Date Made

Continuing disclosure is required if information changes. This Vendor Disclosure Statement form is available at www.lakecountyil.gov.

The full text of the County's Ethics and Procurement policies and ordinances are available at www.lakecountyil.gov.

I hereby acknowledge that the information above is accurate and complete, that I am an authorized signer on behalf of the vendor, that I have read and understand these disclosure requirements, and that I agree to update this information if there are any related changes by submitting a new Vendor Disclosure Statement.

Authorized Signature:		Title:	
Printed Name:		Date:	

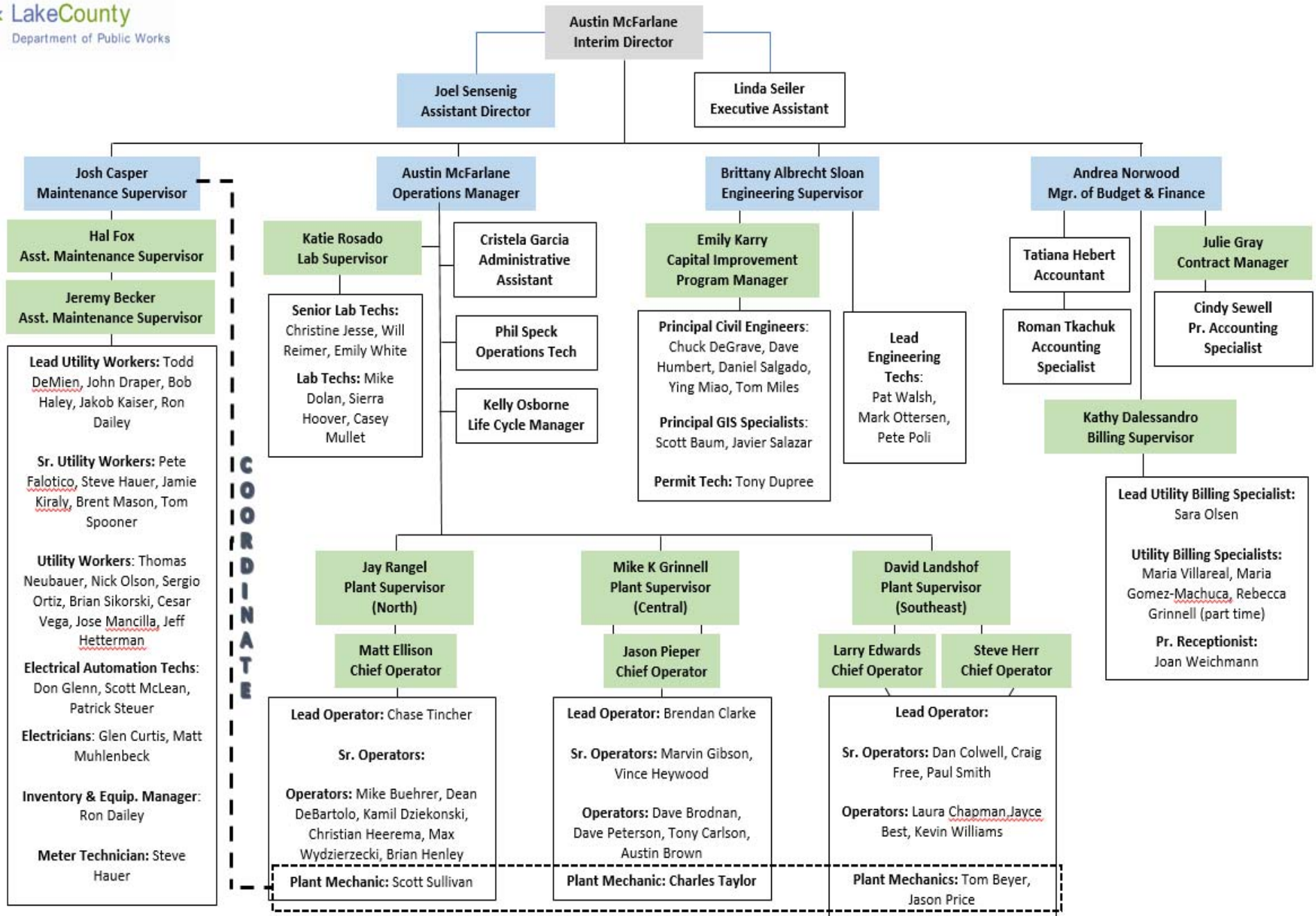
Vendors must insert "x" in the following box indicating exception and provide a brief narrative for exception.

☐

Computerized Maintenance Management System (CMMS)

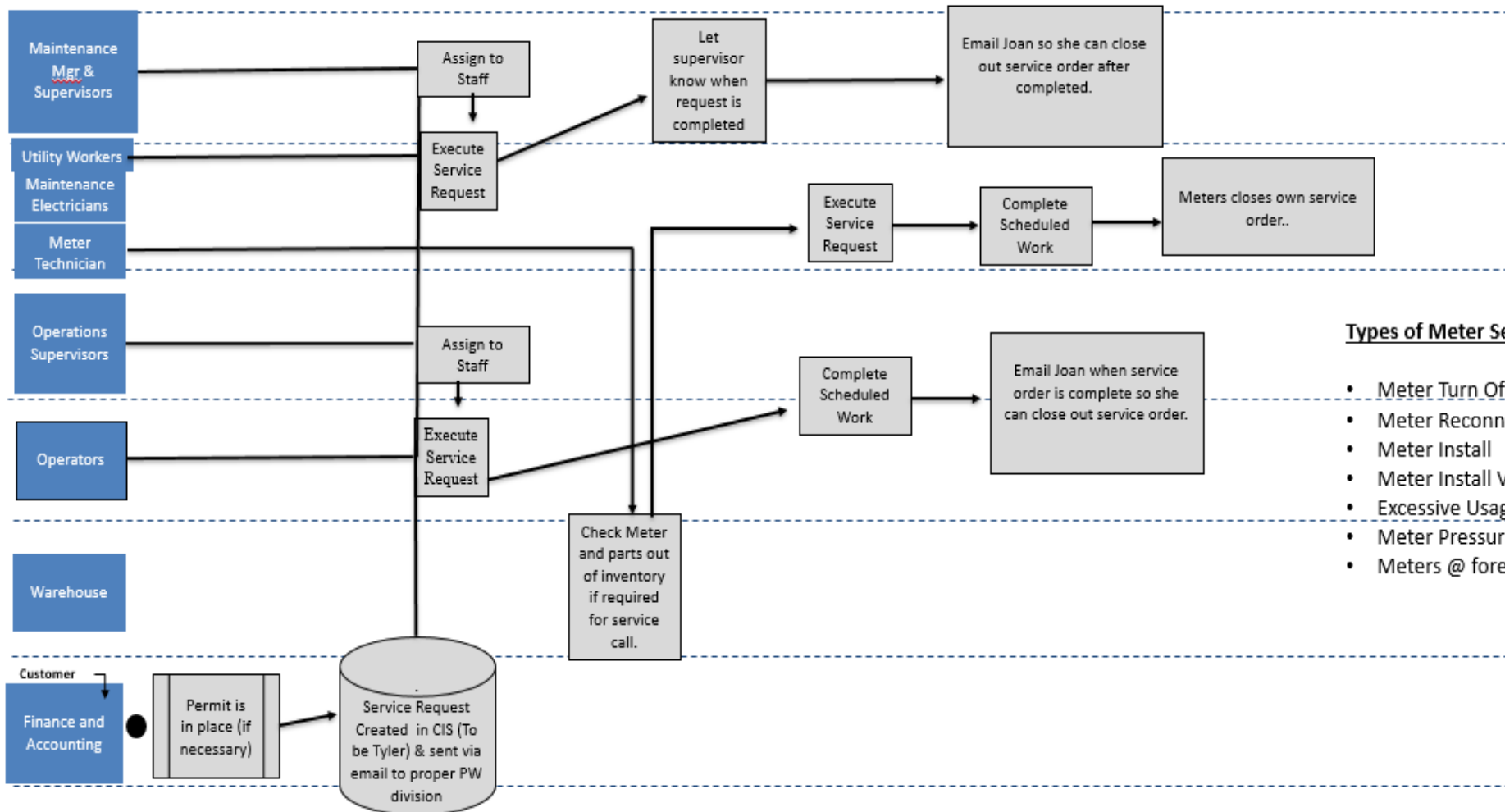
EXHIBIT A

AS-IS & TO-BE PUBLIC WORKS WORKFLOWS
FACILITIES DEPARTMENT EXAMPLE WORKFLOWS



Computerized Maintenance Management System Procurement -LCPW

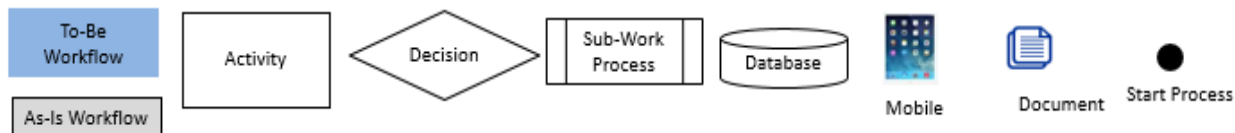
Service Requests / Water Meter Servicing **AS-IS**



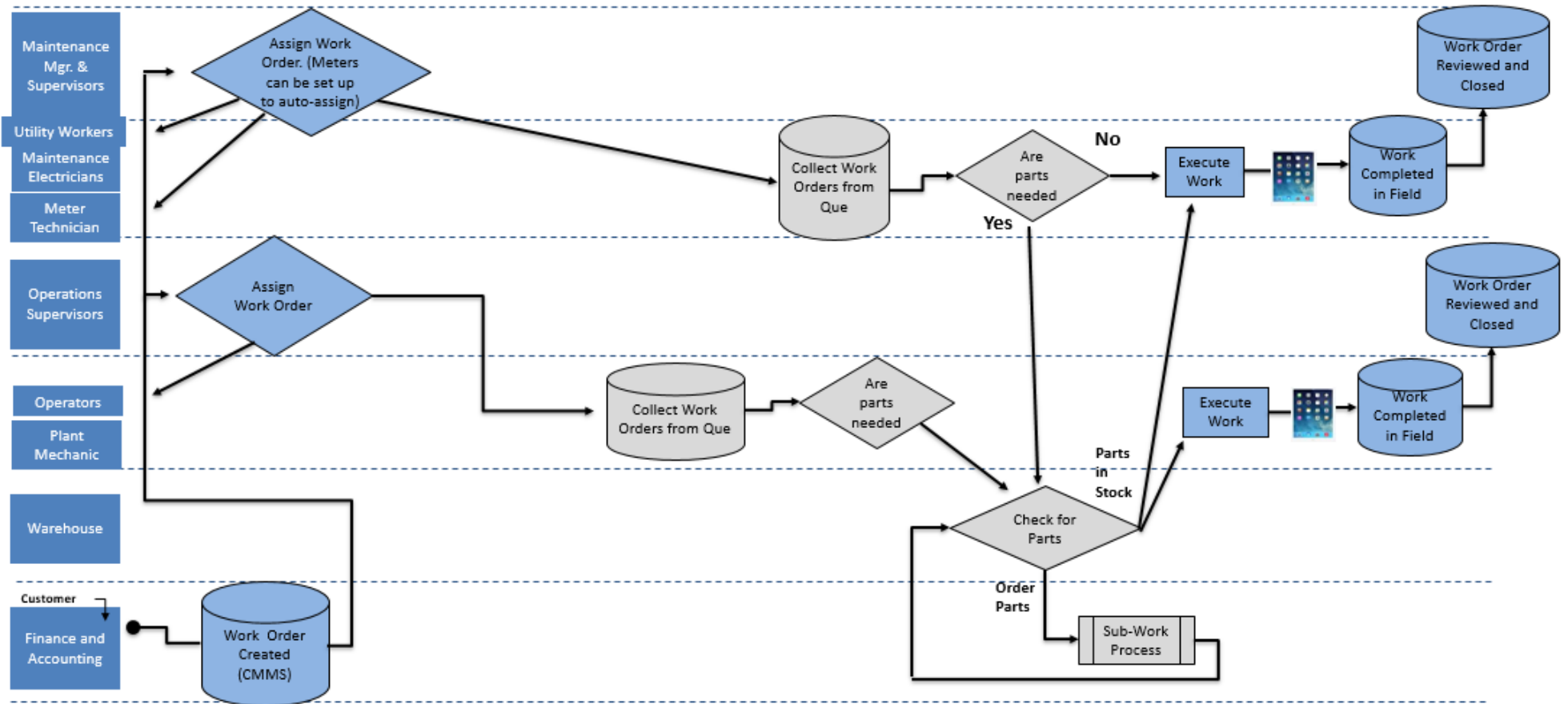
Types of Meter Servicing:

- Meter Turn Offs
- Meter Reconnects
- Meter Install
- Meter Install Verifications
- Excessive Usage
- Meter Pressure Checks
- Meters @ foreclosures

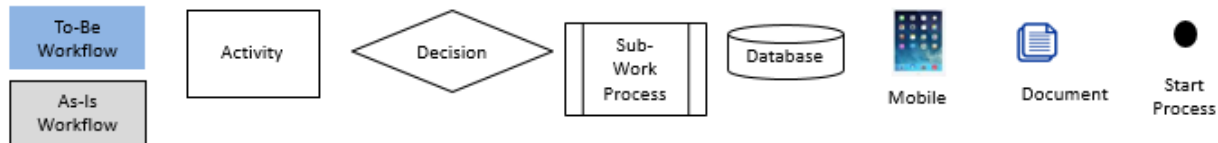
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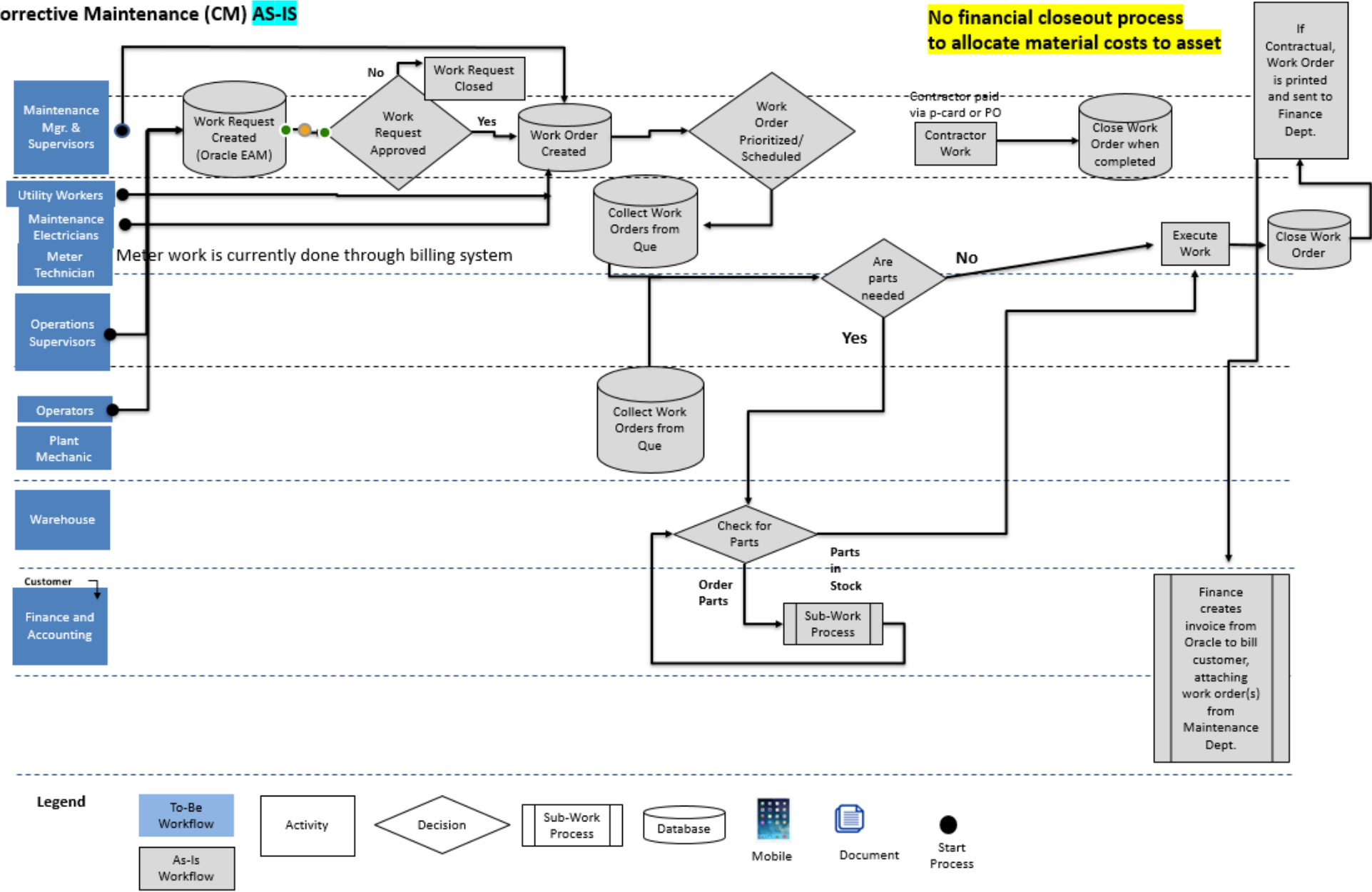
Computerized Maintenance Management System - LCPW
Service Requests / Water Meter Servicing TO BE



Legend

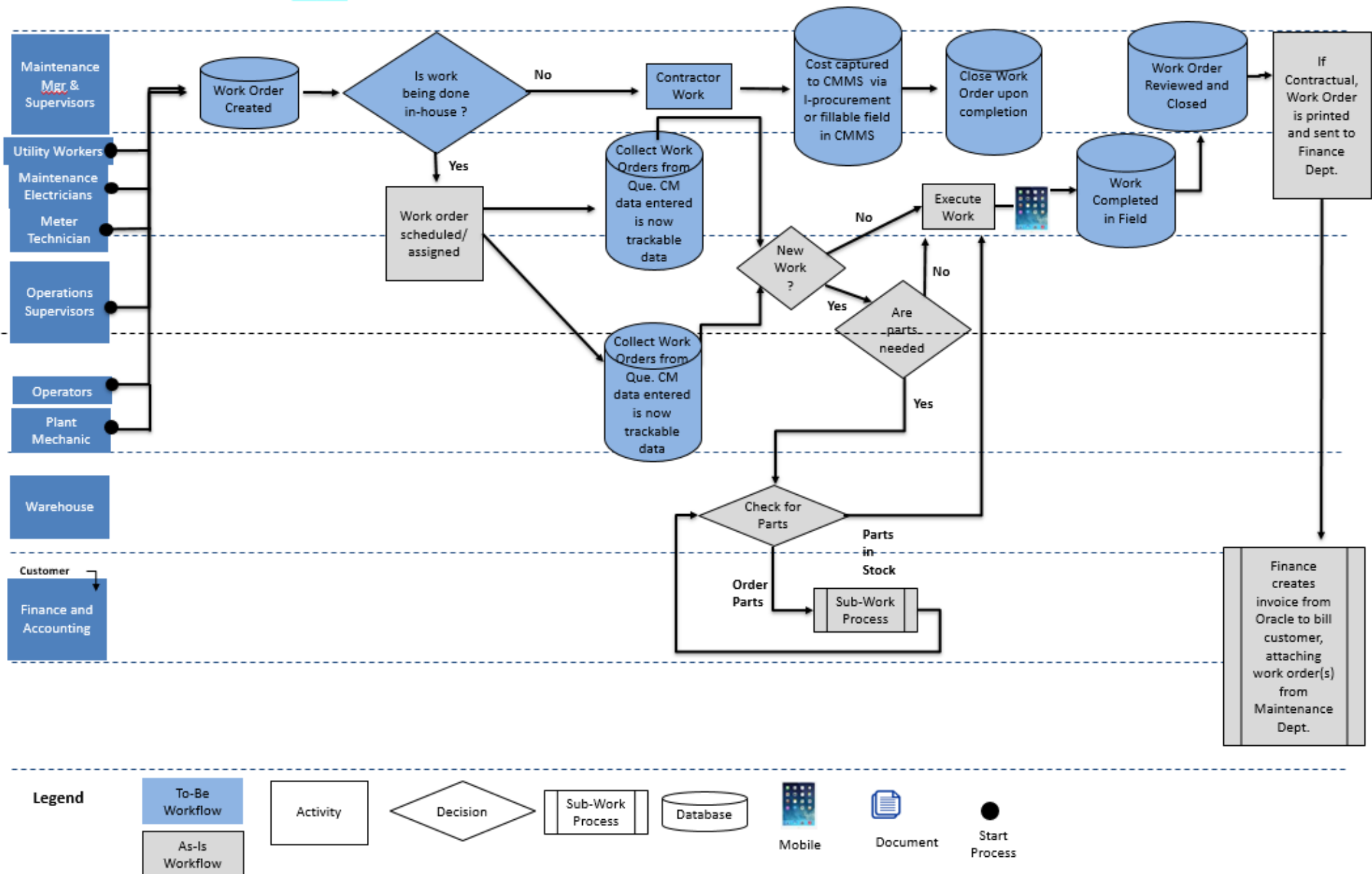


Computerized Maintenance Management System - LCPW
Corrective Maintenance (CM) AS-IS



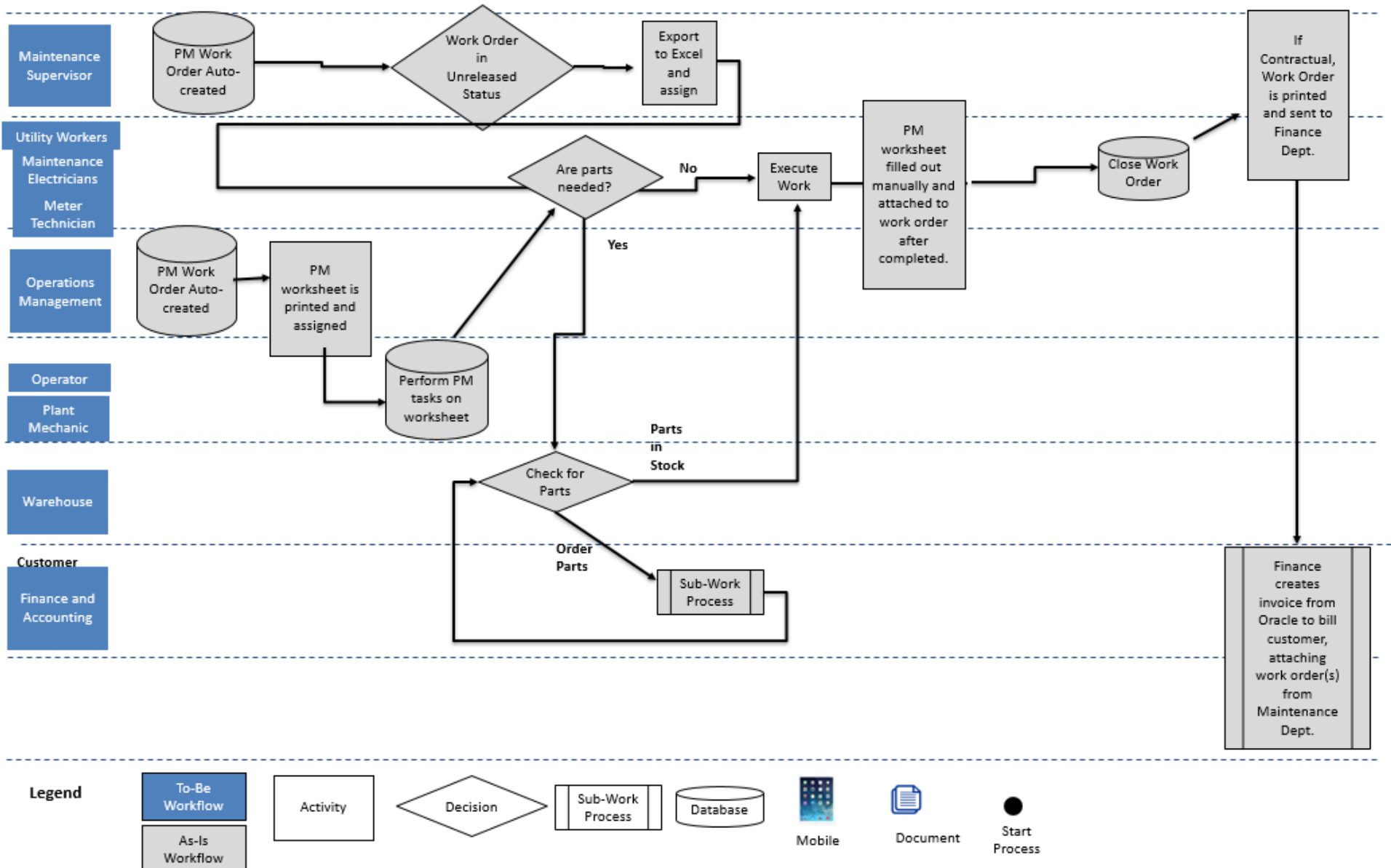
Computerized Maintenance Management System Procurement -LCPW

Corrective Maintenance (CM) **TO-BE** (Non-Scheduled)



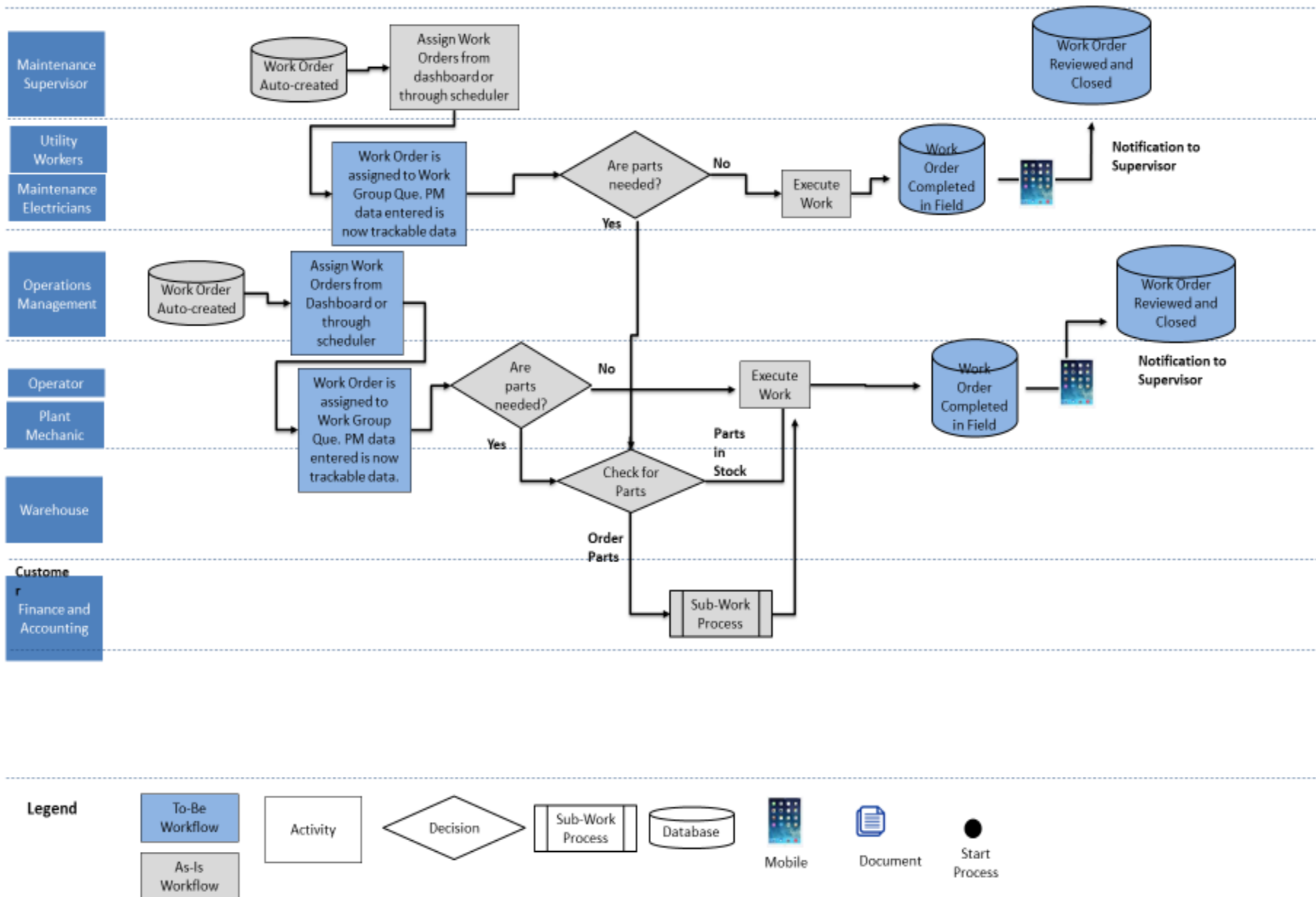
Computerized Maintenance Management System - LCPW
Scheduled Preventative and Predictive Maintenance (PM) AS-IS

**No closeout process
to allocate material costs to asset**



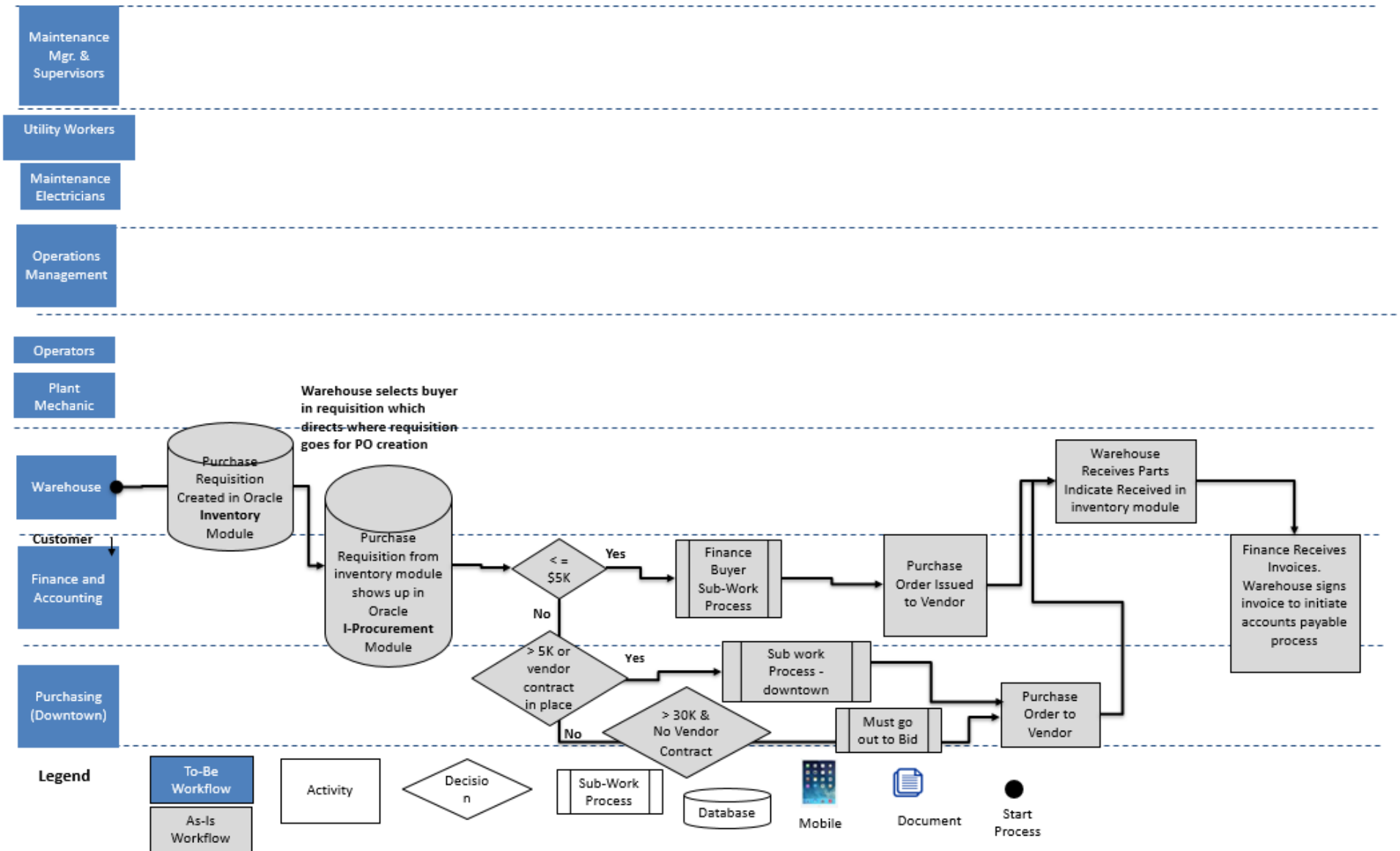
Computerized Maintenance Management System Procurement -LCPW

Scheduled Preventative and Predictive Maintenance (PM) **TO-BE**



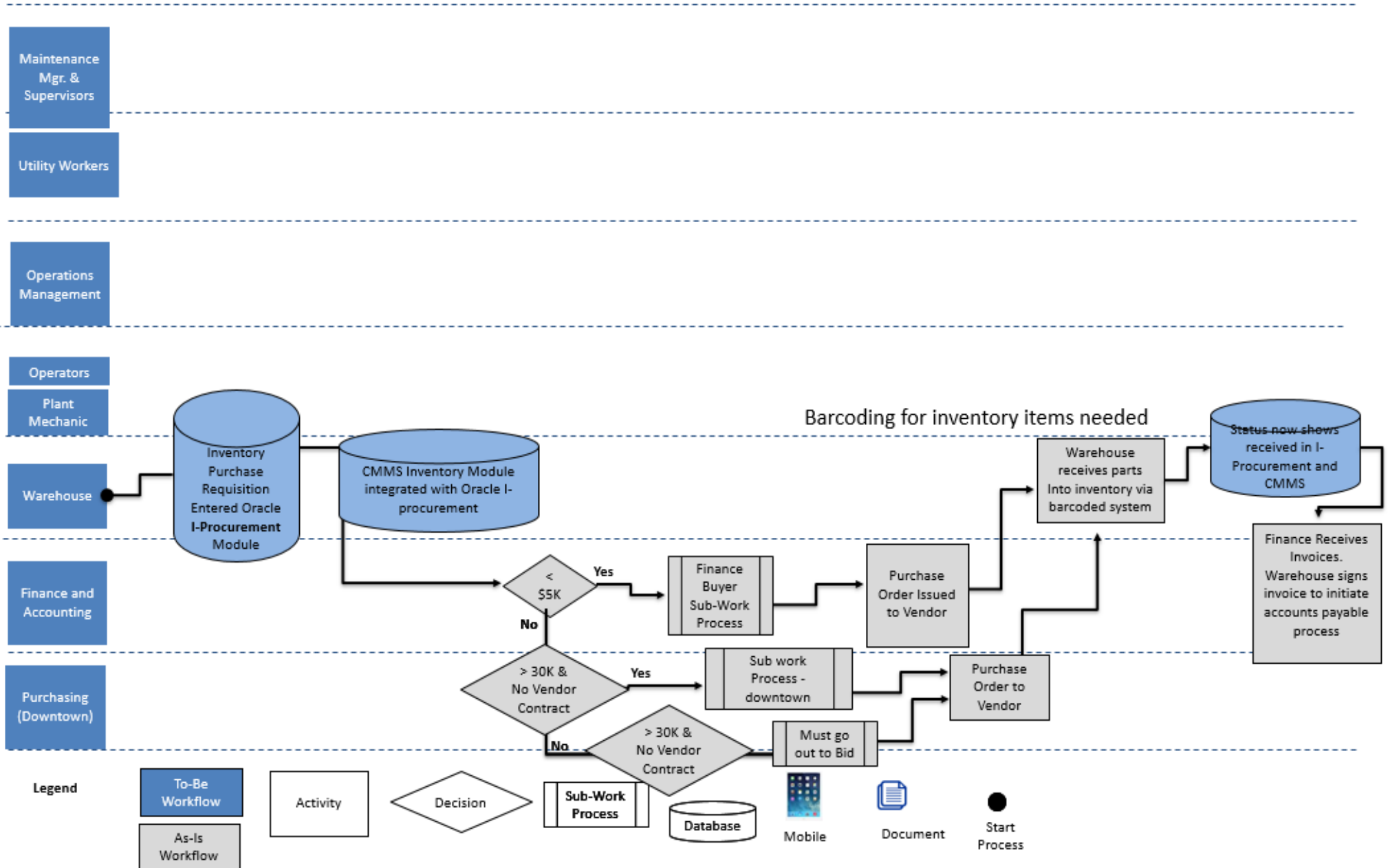
Computerized Maintenance Management System - LCPW

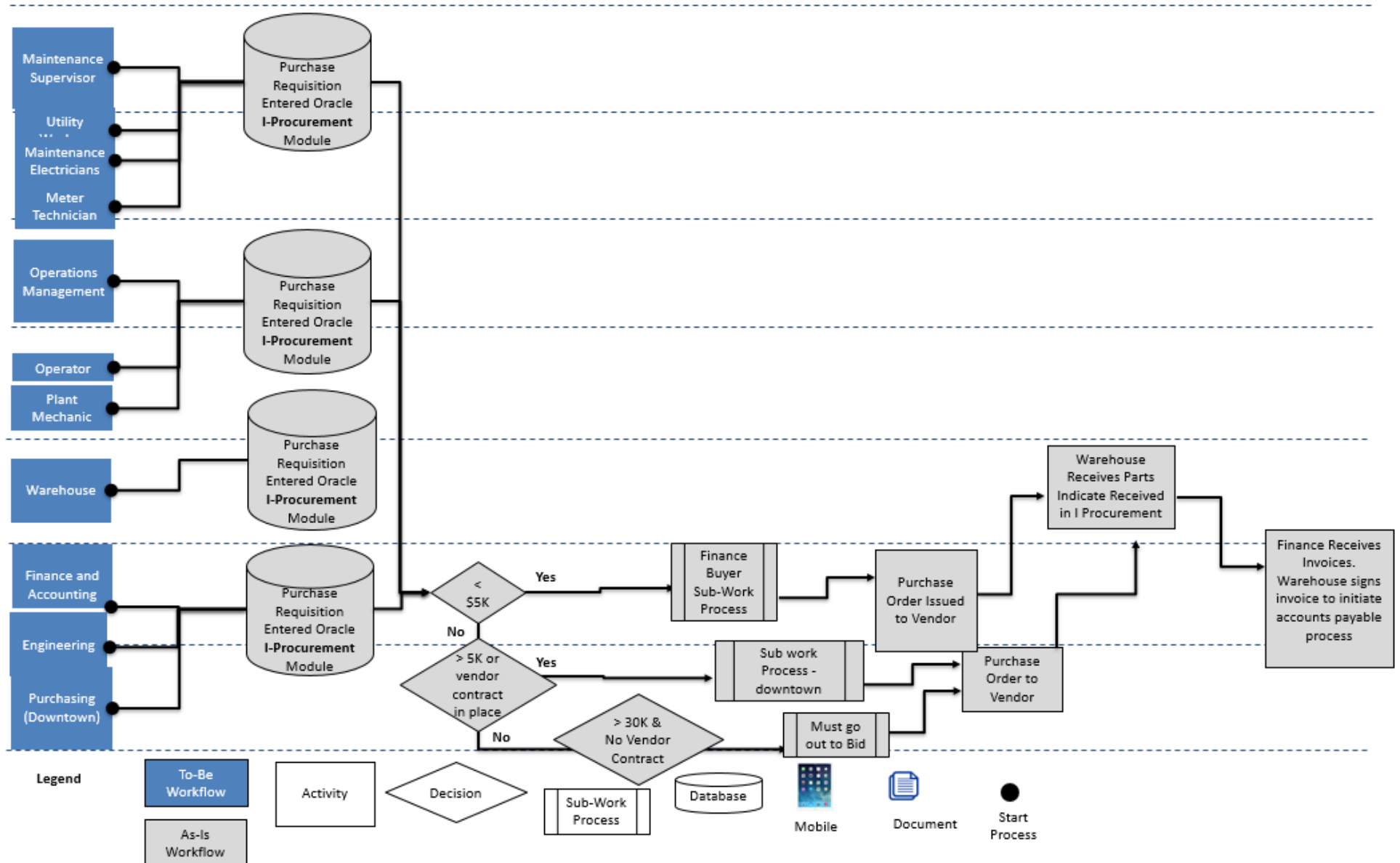
Purchasing Process For INVENTORY ITEMS AS-IS



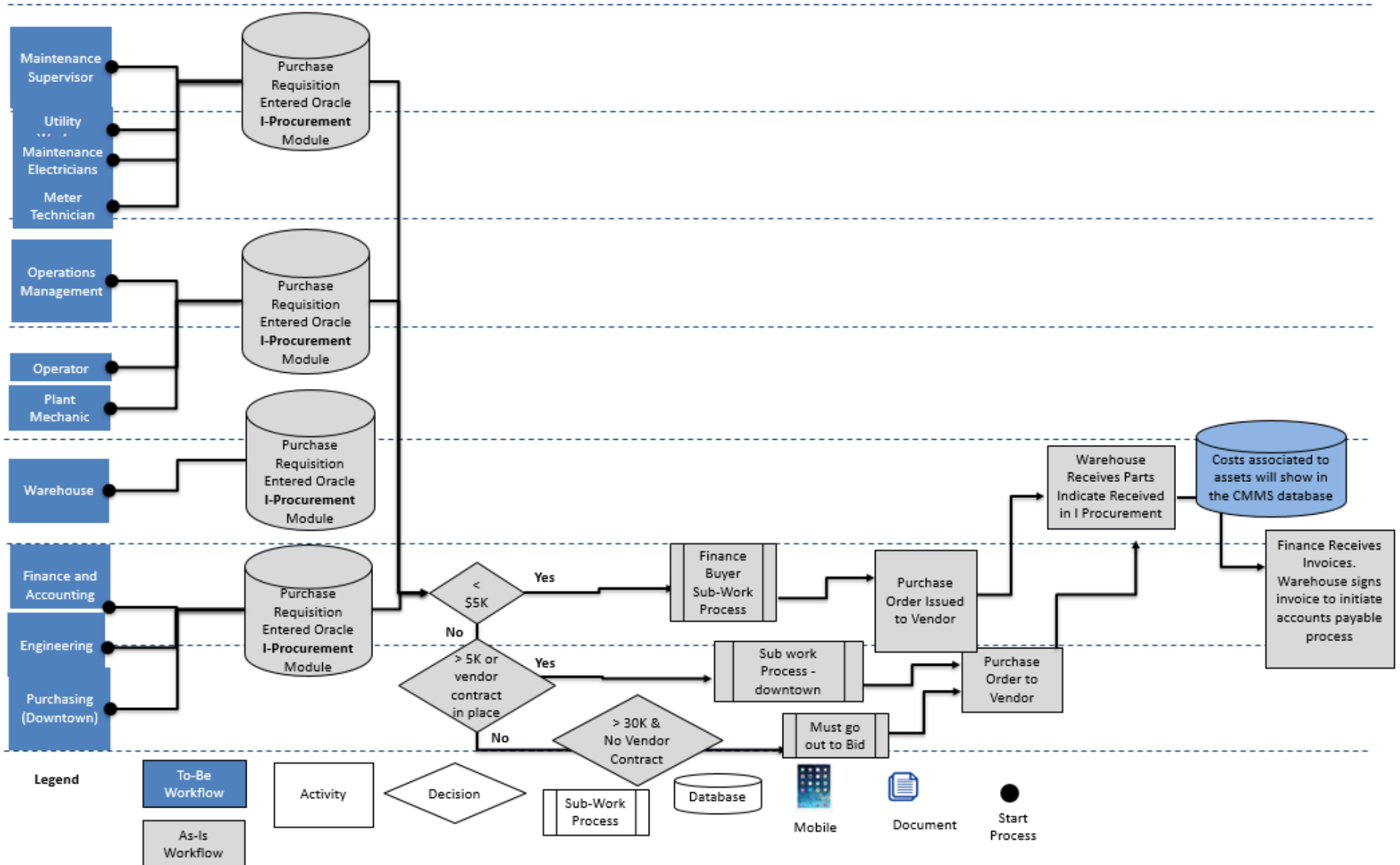
Computerized Maintenance Management System Procurement -LCPW

Purchasing Inventory Items Process **TO-BE**





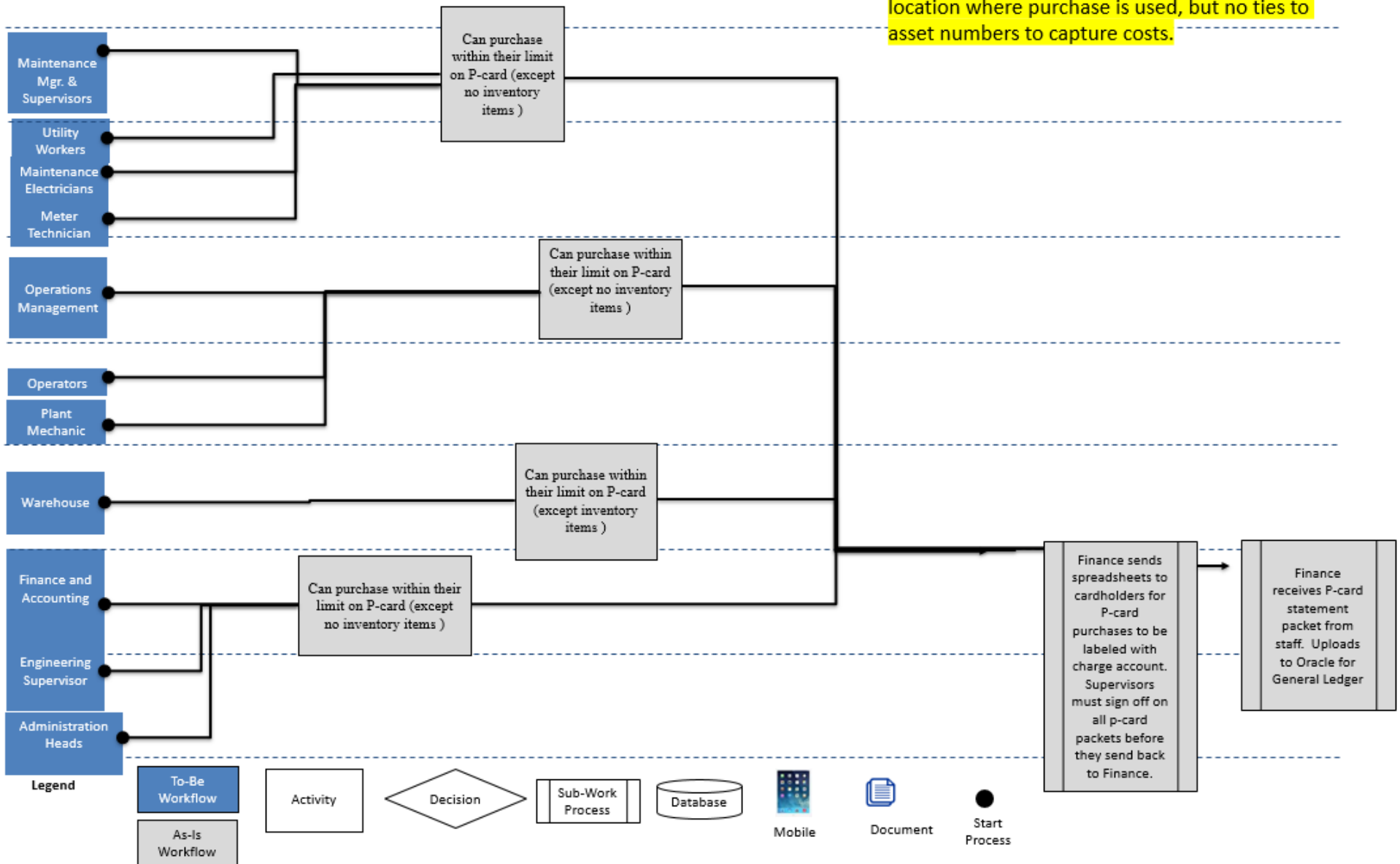
Computerized Maintenance Management System - LCPW
Purchasing Process Oracle I-Procurement TO BE



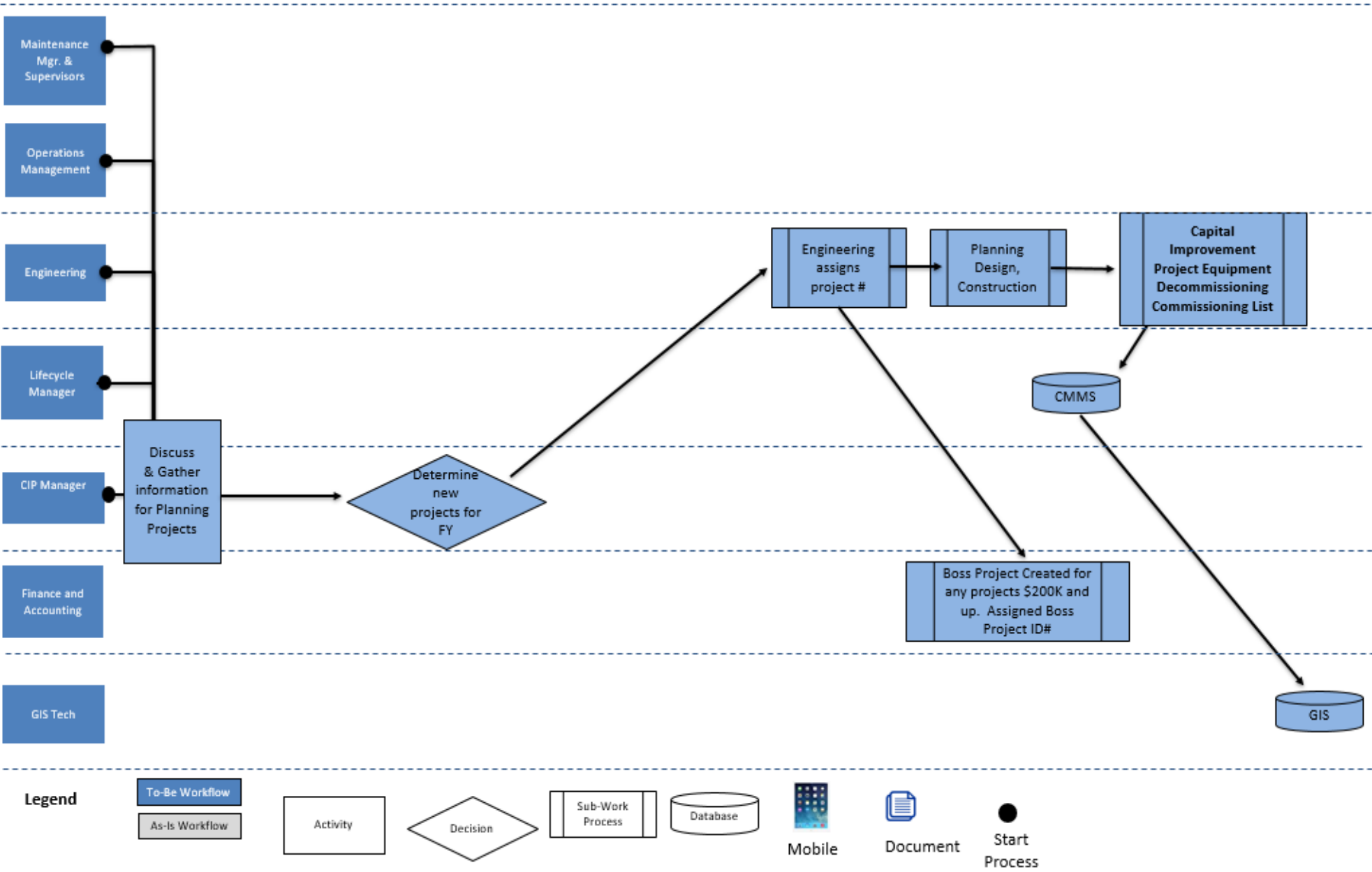
Computerized Maintenance Management System - LCPW

Purchasing Process for P-CARD **AS-IS**

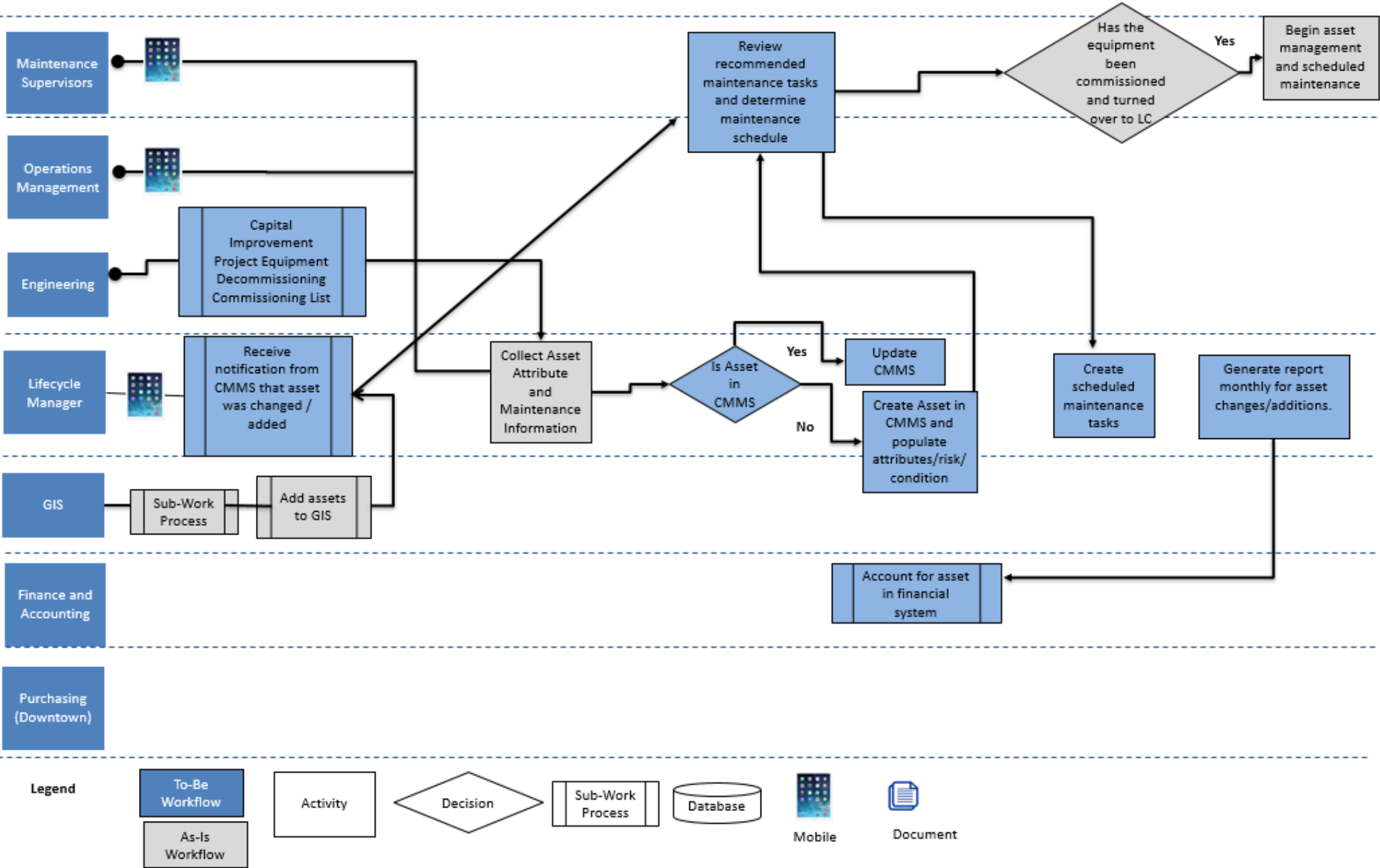
There is no connection between p-card purchases and assets. Every purchase on P-card is charged to location where purchase is used, but no ties to asset numbers to capture costs.



Lake County, IL Facility Planning Risk Assessment
 Capital Improvement Project Workflow **TO-BE**

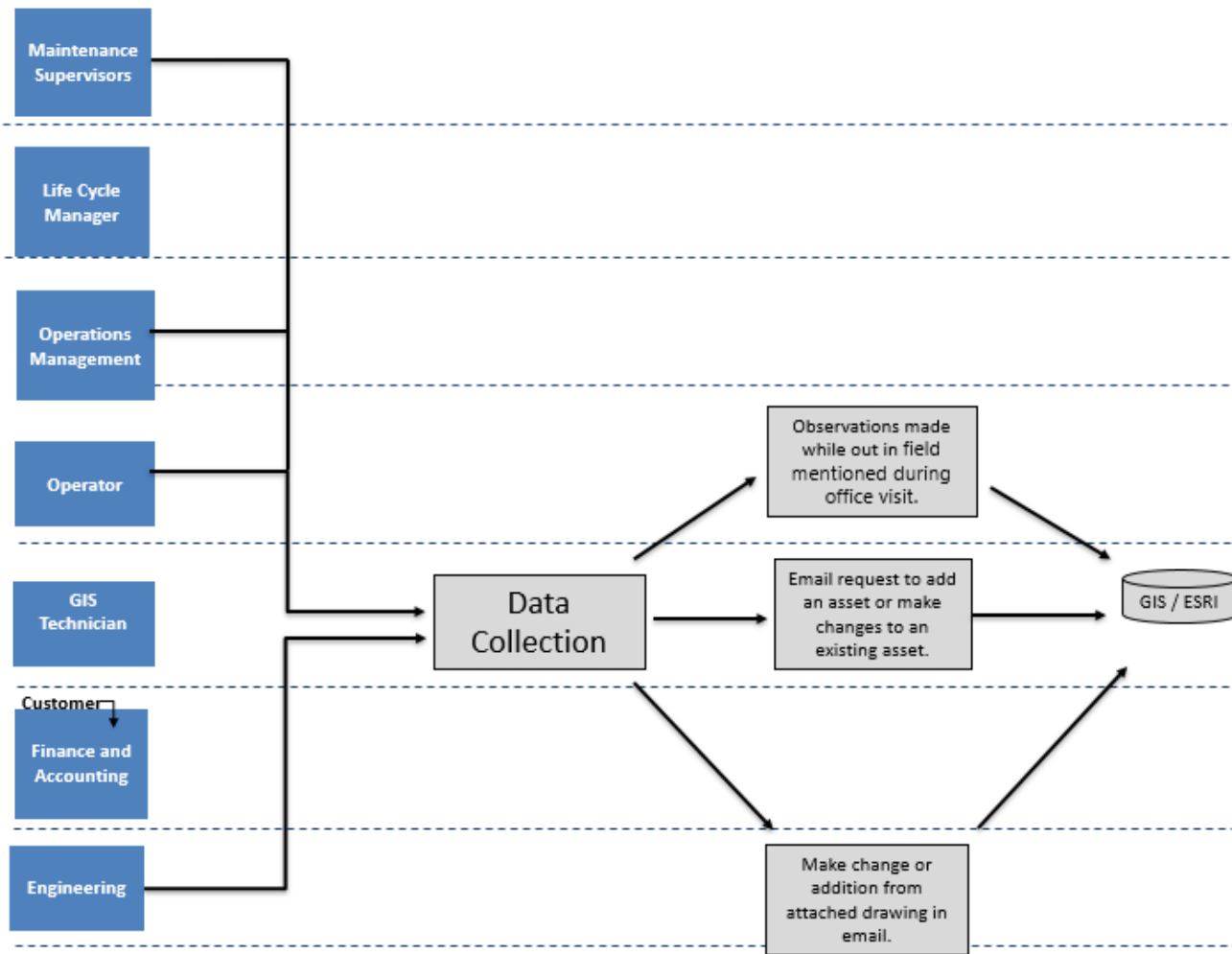


Computerized Maintenance Management Software -LCPW Asset Commissioning **TO-BE**

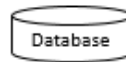
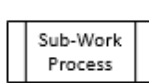
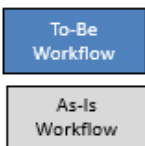


Computerized Maintenance Management System - LCPW
Data Collection for adding assets and changing asset information in GIS --

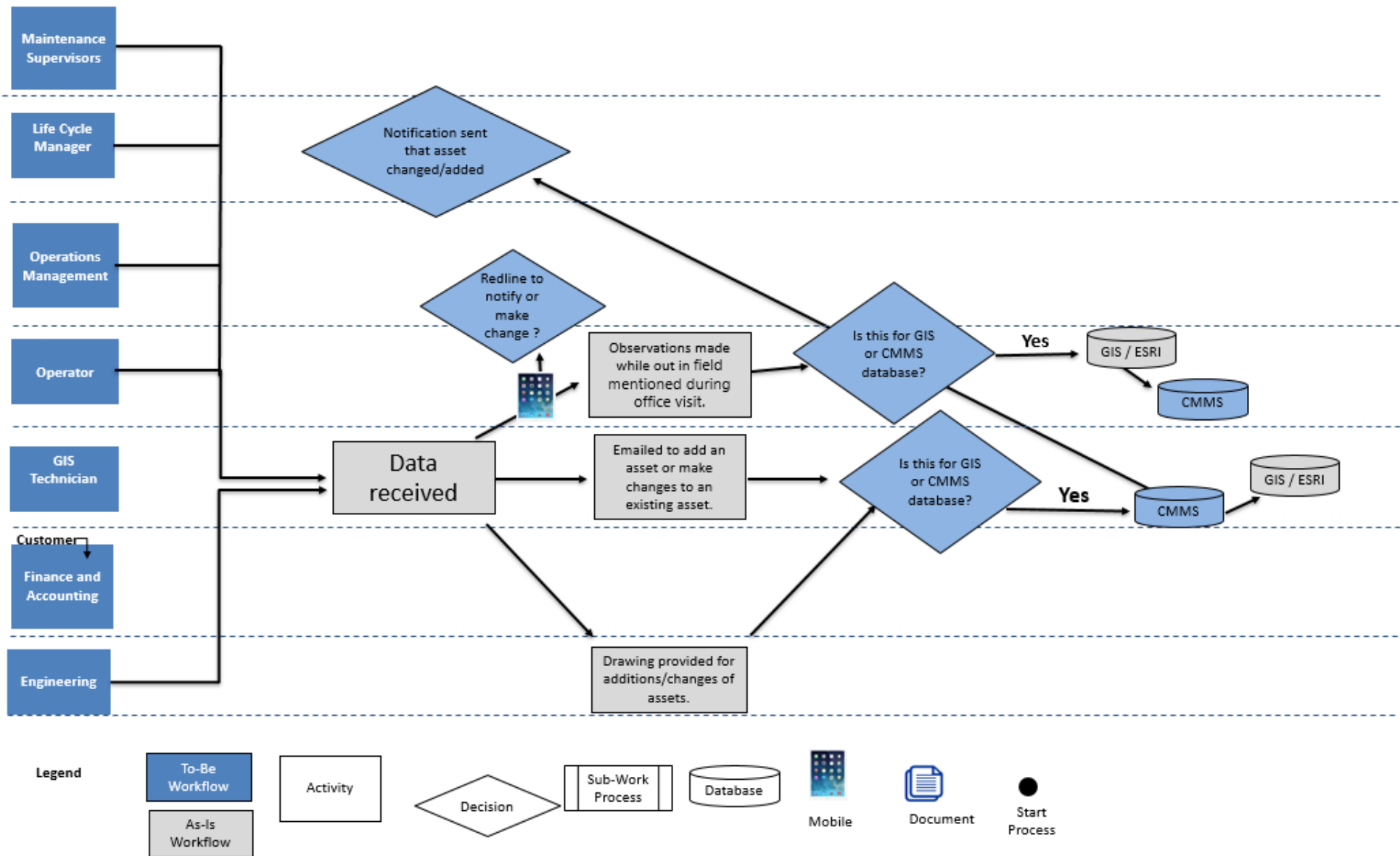
--- **AS-IS**



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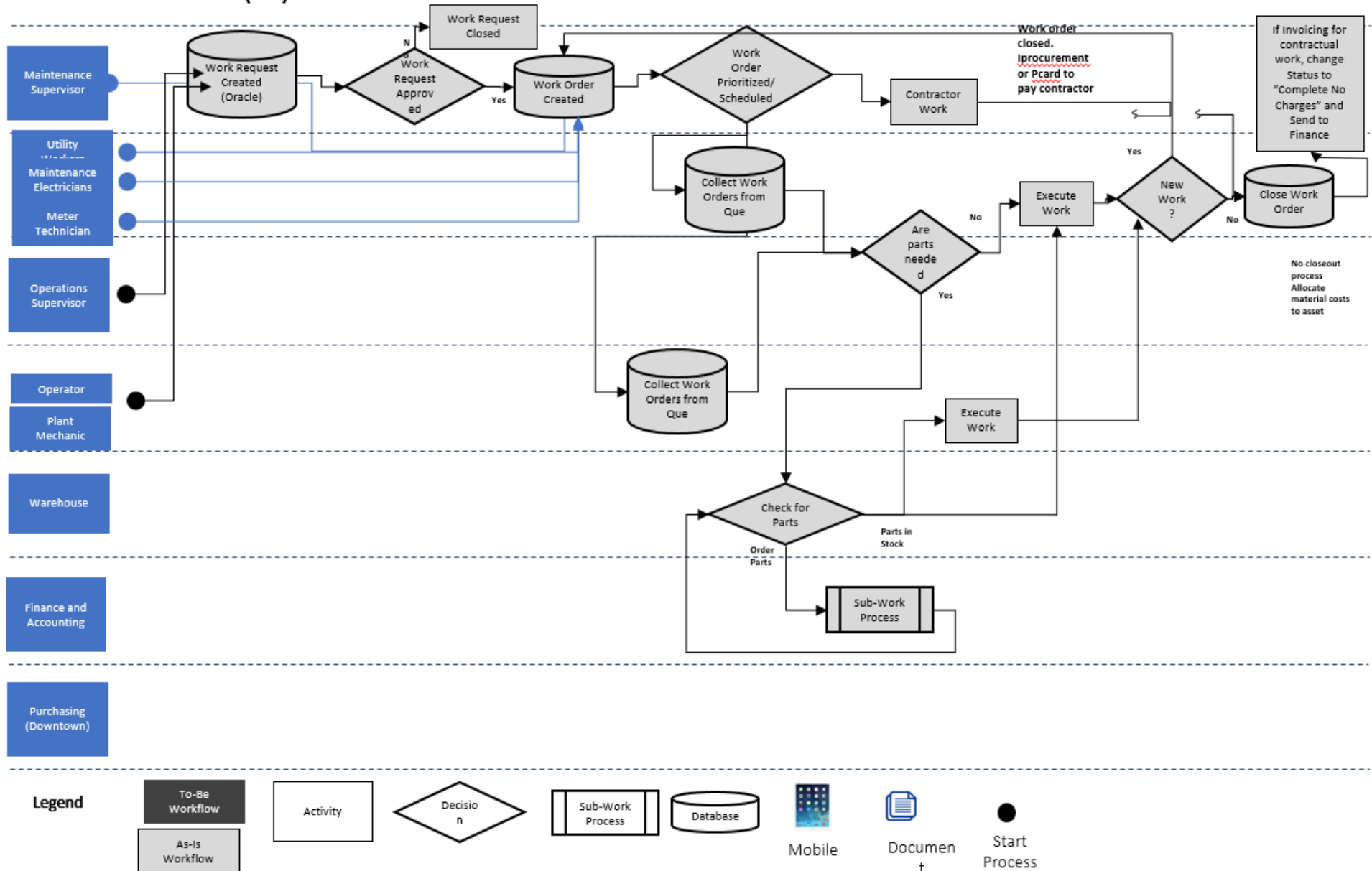


Computerized Maintenance Management System - LCPW
Data Collection for adding assets and changing asset information in GIS ---
--TO BE



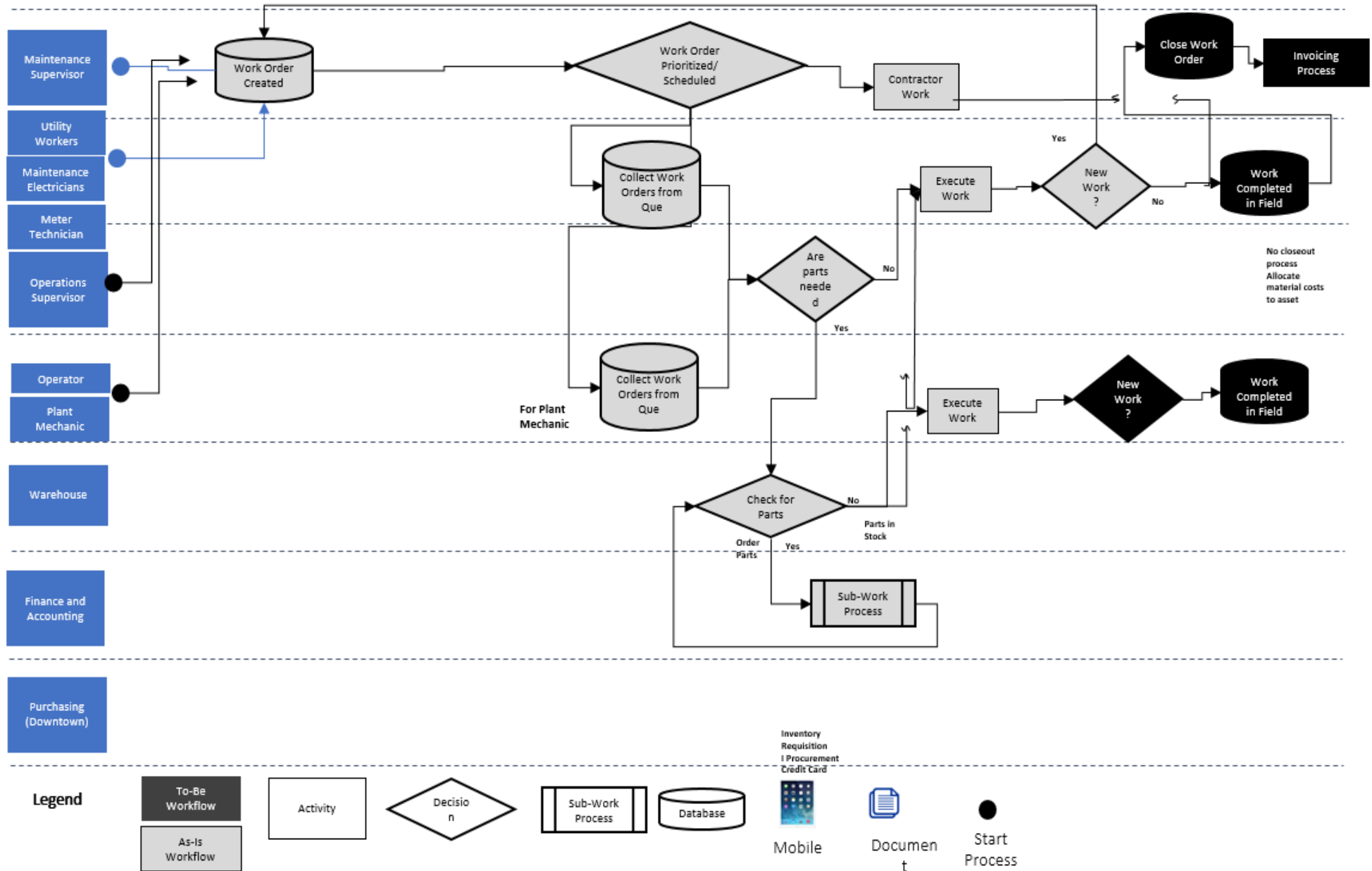
Facilities Department - EXAMPLE

Corrective Maintenance (CM) AS-IS WORKFLOW

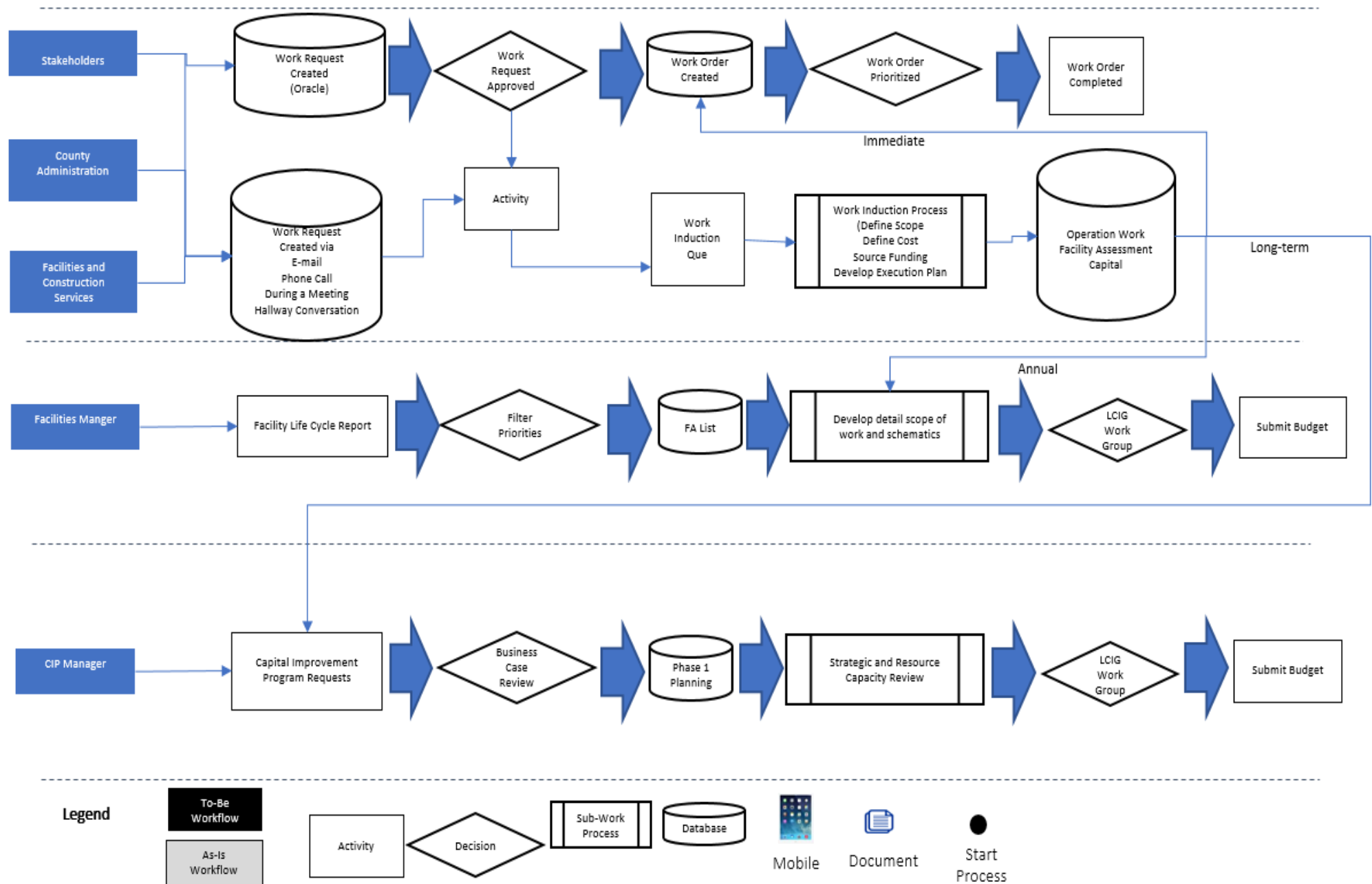


Facilities Department -EXAMPLE

Corrective Maintenance (CM) TO-BE WORKFLOW WITH CMMS



Lake County, IL Facility and Construction Services Department
"TO BE" CONSTRUCTION PROJECTS WORKFLOW



Computerized Maintenance Management System (CMMS)
EXHIBIT B – CONCEPT FOR SCHEDULED PREVENTIVE MAINTENANCE CHECKLISTS

Can Lift Station Mechanical PM I

[illegible]

Pumps				Instructions :										Transducer	
	Pump #1	Pump #2	Pump #3	If a satisfactory condition is present, Place an X or a check mark on the line for the item. If an unsatisfactory condition is present, write bad on the line for the item. Explain the bad rating in the comments section. If there is an item does not apply to the station, write NA on the line for the item. Enter the readings on the lines where applicable.										Cleaned	
Breaker Disconnect														Support	
H.O.A. Working														Cable	
Impeller Nut														Lead On	
Impeller Condition														Lag On	
Cord Grips														All-Off	
Seal/Pow er														High Water	
Lifting Cage/Eye														Alarm On	
Lids														Floats	
Cords Condition														Floats	
Seal Oil (Sub Only)														Cleaned	
Volute Condition														General	
Sealing Flange														Overall	
Gasket														Condition	
Run Time Hours														Fence &	
Discharge Pressure														Gates	
Voltage A-B														Driveway	
Voltage A-C														Security	
Voltage B-C														Lights	
Voltage A-G														Trip	
Voltage B-G														Hazards	
Voltage C-G														Exterior	
Amps A														Paint	
Amps B														Interior	
Amps C														Paint	
Pump Condition Assessment														Doors	
Likelihood of failure:	Pump #1	Pump #2	Pump #3											Ladders	
High failure rate														Locks	
Medium failure rate															
Low failure rate														Frame Base	Anti Fall Attachment
														Frame	Bolts
														Pedestal	Welds
														Nuts and Bolts	Brackets
															Plug
															Drain Hole

Reservoir Mechanical PM I

Lift Station Name _____

Date _____

Pumps					Instructions:																																																																	
	Pump #1	Pump #2	Pump #3	Pump #4	If a satisfactory condition is present, Place an X or a check mark on the line for the item. If an unsatisfactory condition is present, write bad on the line for the item. Explain the bad rating in the comments section. If there is an item does not apply to the station, write NA on the line for the item. Enter the readings on the lines where applicable.																																																																	
Breaker	_____	_____	_____	_____	Other Inspection Items <table style="width:100%; border-collapse: collapse;"> <tr> <th style="width:10%;">Test Dialer In Alarm Mode</th> <th style="width:10%;">Crane/Gantry</th> <th style="width:10%;">Dehumidifier</th> <th style="width:10%;">Lighting</th> <th style="width:10%;">Sump Pump</th> <th style="width:10%;">Bathroom</th> <th style="width:10%;">Furnace / HVAC</th> <th style="width:10%;">Air Exchanger</th> </tr> <tr> <td>Operational</td> <td>_____</td> <td>_____</td> <td>_____</td> <td>_____</td> <td>_____</td> <td>_____</td> <td>_____</td> </tr> <tr> <td>Crock Clean</td> <td>_____</td> <td>_____</td> <td>_____</td> <td>_____</td> <td>_____</td> <td>_____</td> <td>_____</td> </tr> <tr> <td>Float Working</td> <td>_____</td> <td>_____</td> <td>_____</td> <td>_____</td> <td>_____</td> <td>_____</td> <td>_____</td> </tr> <tr> <td>On/Off</td> <td>_____</td> <td>_____</td> <td>_____</td> <td>_____</td> <td>_____</td> <td>_____</td> <td>_____</td> </tr> <tr> <td>Bearing Oiled / Greased</td> <td>_____</td> <td>_____</td> <td>_____</td> <td>_____</td> <td>_____</td> <td>_____</td> <td>_____</td> </tr> <tr> <td>Inlet Cleaned / Greased</td> <td>_____</td> <td>_____</td> <td>_____</td> <td>_____</td> <td>_____</td> <td>_____</td> <td>_____</td> </tr> </table>										Test Dialer In Alarm Mode	Crane/Gantry	Dehumidifier	Lighting	Sump Pump	Bathroom	Furnace / HVAC	Air Exchanger	Operational	_____	_____	_____	_____	_____	_____	_____	Crock Clean	_____	_____	_____	_____	_____	_____	_____	Float Working	_____	_____	_____	_____	_____	_____	_____	On/Off	_____	_____	_____	_____	_____	_____	_____	Bearing Oiled / Greased	_____	_____	_____	_____	_____	_____	_____	Inlet Cleaned / Greased	_____	_____	_____	_____	_____	_____	_____
Test Dialer In Alarm Mode	Crane/Gantry	Dehumidifier	Lighting	Sump Pump											Bathroom	Furnace / HVAC	Air Exchanger																																																					
Operational	_____	_____	_____	_____											_____	_____	_____																																																					
Crock Clean	_____	_____	_____	_____											_____	_____	_____																																																					
Float Working	_____	_____	_____	_____											_____	_____	_____																																																					
On/Off	_____	_____	_____	_____	_____	_____	_____																																																															
Bearing Oiled / Greased	_____	_____	_____	_____	_____	_____	_____																																																															
Inlet Cleaned / Greased	_____	_____	_____	_____	_____	_____	_____																																																															
Disconnect	_____	_____	_____	_____	Frame Base Frame _____ Pedestal _____ Nuts and Bolts _____ Flow Meters _____							Cla Valves Strainer _____ Operating _____ Operate Valves _____		Air Reliefs Operate _____ Claen _____																																																								
H.O.A. Working	_____	_____	_____	_____																																																																		
Impeller Condition	_____	_____	_____	_____																																																																		
Cords Condition	_____	_____	_____	_____																																																																		
Volute Condition	_____	_____	_____	_____																																																																		
GPM	_____	_____	_____	_____	General Overall Condition _____ Fence & Gates _____ Driveway _____ Security Lights _____ Trip Hazards _____ Exterior Paint _____ Interior Paint _____ Doors _____ Ladders _____ Locks _____																																																																	
Run Time Hours	_____	_____	_____	_____																																																																		
Discharge Pressure	_____	_____	_____	_____																																																																		
Pump Condition Assessment				Valves <table style="width:100%; border-collapse: collapse;"> <tr> <th style="width:10%;">Likelihood of failure:</th> <th style="width:10%;">Pump #1</th> <th style="width:10%;">Pump #2</th> <th style="width:10%;">Pump #3</th> <th style="width:10%;">Pump #4</th> </tr> <tr> <td>High failure rate</td> <td>_____</td> <td>_____</td> <td>_____</td> <td>_____</td> </tr> <tr> <td>Medium failure rate</td> <td>_____</td> <td>_____</td> <td>_____</td> <td>_____</td> </tr> <tr> <td>Low failure rate</td> <td>_____</td> <td>_____</td> <td>_____</td> <td>_____</td> </tr> </table>								Likelihood of failure:	Pump #1	Pump #2	Pump #3	Pump #4	High failure rate	_____	_____	_____	_____	Medium failure rate	_____	_____	_____	_____	Low failure rate	_____	_____	_____	_____																																							
Likelihood of failure:	Pump #1	Pump #2	Pump #3									Pump #4																																																										
High failure rate	_____	_____	_____								_____																																																											
Medium failure rate	_____	_____	_____								_____																																																											
Low failure rate	_____	_____	_____								_____																																																											
Valves				Other Valves _____																																																																		
Inlet Valve #1	Operates _____	No Visible Leaks _____	Packing/O-rings _____																																																																			
Inlet Valve #2	_____	_____	_____																																																																			
Inlet Valve #3	_____	_____	_____																																																																			
Inlet Valve #4	_____	_____	_____																																																																			
Outlet Valve #1	_____	_____	_____	Other Valves _____																																																																		
Outlet Valve #2	_____	_____	_____																																																																			
Outlet Valve #3	_____	_____	_____																																																																			
Outlet Valve #4	_____	_____	_____																																																																			
Check Valve #1	_____	_____	_____																																																																			
Check Valve #2	_____	_____	_____	Other Valves _____																																																																		
Check Valve #3	_____	_____	_____																																																																			
Check Valve #4	_____	_____	_____																																																																			
Other Valves			Other Valves _____																																																																			



Lake County

**L.C.P.W. NORTHEAST AREA - GRANDWOOD PARK WATER SYSTEM
GEIER STREET WELLHOUSE WELL REPORT
18693 GEIER STREET, GURNEE, IL FACILITY NUMBER: 097-5600**

Month: **December 2019**

Date	Day	Time Logged In	By	WELL #2 (IEPA ID - WELL 20015)						CHEMICAL USAGE										System Pressure	
				WELL DEPTH : 159 FT.			WELL PUMP SETTING : 130 FT.			CHLORINE						PHOSPHATE					
				Meter Reading	Gallons Pumped	Hour Meter	Run Time	Static Level	Pump Level	NaOCl : 2.0 lbs/24 hrs			Chlorine Concentrations, in mg/L			PO4 PUMP: Frequency: 20 Stroke: 40					
										Lbs. of Cl2 left	Lbs. of Cl2 Used	Lbs. of Cl2 Add	Dosage	Demand	Total Residual	Free Residual	Pounds of PO4 Left	Pounds of PO4 Used	Pounds of PO4 Added		PO4 Residual
PREVIOUS READINGS:				54407696		7957.7				390.2							0.0				
01	Sun	8:00	BH	54407696		7957.7				390.2							0.0				51
02	Mon	7:00	MB	54407696		7957.7				390.2							0.0				51
03	Tue	7:00	MB	54407696		7957.7				390.2							0.0				51
04	Wed	7:00	MB	54407696		7958.0	0.3	78	98	390.2							0.0				51
05	Thu	7:00	MB	54407696		7958.0				390.2							0.0				51
06	Fri	7:00	MB	54407696		7958.0				390.2							0.0				51
07	Sat	9:00	KD	54407696		7958.0				390.2							0.0				52
08	Sun	9:00	KD	54407696		7958.0				390.2							0.0				51
09	Mon	7:00	MB	54407696		7958.0				390.2							0.0				52
10	Tue	7:00	MB	54407696		7958.0				390.2							0.0				51
11	Wed	7:00	MB	54407696		7958.0				390.2							0.0				51
12	Thu	7:00	MB	54407696		7958.0				390.2							0.0				52
13	Fri	7:00	MB	54407696		7958.0				390.2							0.0				52
14	Sat	8:00	SPS	54407696		7958.0				390.2							0.0				52
15	Sun	8:00	SPS	54407696		7958.0				390.2							0.0				51
16	Mon	7:00	MB	54407696		7958.0				390.2							0.0				51
17	Tue	7:00	MB	54407696		7958.0				390.2							0.0				51
18	Wed	7:00	MB	54407696		7958.0				390.2							0.0				52
19	Thu	7:00	BH	54407696		7958.0				390.2							0.0				51
20	Fri	7:00	BH	54407696		7958.0				390.2							0.0				51
21	Sat	8:00	BH	54407696		7958.0				390.2							0.0				51
22	Sun	8:00	BH	54407696		7958.0				390.2							0.0				51
23	Mon	7:00	BH	54407696		7958.0				390.2							0.0				51
24	Tue	9:45	KD	54407696		7958.0				390.2							0.0				50
25	Wed	9:35	KD	54407696		7958.0				390.2							0.0				50
26	Thu	7:00	BH	54407696		7958.0				390.2							0.0				51
27	Fri	7:00	ME	54407696		7958.0				390.2							0.0				60
28	Sat	10:20	KD	54407696		7958.0				390.2							0.0				51
29	Sun	10:05	KD	54407696		7958.0				390.2							0.0				50
30	Mon	7:00	BH	54407696		7958.0				390.2							0.0				52
31	Tue	7:00	BH	54407696		7958.0				390.2							0.0				52
TOTAL					0		0.3				0.0	0.0						0.0	0.0		
AVERAGES					#DIV/0!		0.3	78	98		#DIV/0!		#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!		#DIV/0!		#DIV/0!	51
MAXIMUM					0		0.3				0.0							0.0			
MINIMUM					0		0.3				0.0							0.0			

SYSTEM MAINTENANCE AND PROBLEMS	
DATE	LOCATION & DESCRIPTION
12/04/2019	Safety inspection done
12/04/2019	Raw sample taken
12/04/2019	Estimated 2,080 gallons pumped to waste to obtain raw sample

PERFORMANCE SUMMARY	
WELL # 2	
Capacity (gpm)	104
Time to Water (min)	
Backspin Time (min)	
Drawdown (PL-SL)	20
Sp Capacity (gpm/dd)	5.20

OPERATOR: John Rangel CERTIFICATE # 181624090

John Rangel

Lift Station Site Survey

Date: _____

System #: _____ Submersible _____ Can _____

Location Name _____

Location Address _____

System Contact/Phone
Number _____

Lift Station Manufacturer _____

Model: _____ Serial # _____

Lift Station Design
Capacity _____ Voltage _____

Sump Pump Make _____ Model: _____ Float Style _____

Inline Check
Valves Qty. _____ Size _____ Make _____ Material _____

Valve Style _____ Size _____ Make _____ Material _____

Piping Material _____ Discharge
Location _____

Transducer/
Controller Make _____ Model # _____ Cord Length _____

Lift Station Site Survey

Ladder/Can Station:

Overall Depth	<u> </u>	Bottom Section	<u> </u>	Diameter	<u> </u>	Ladder Section	<u> </u>	Diameter	<u> </u>
Ladder Material	<u> </u>	Door Material	<u> </u>	Lock Style	<u> </u>	Key Required	<u> </u>		

Wet Well/Check Valve Vault:

Concrete Steel	<u> </u>	Hatch Material	<u> </u>	Hatch Size	<u> </u>	Single/Double Door	<u> </u>	Overall Depth	<u> </u>
Inside Diameter	<u> </u>	Inverts/Diameter	<u> </u>	Depth From Top	<u> </u>				

Fresh Air Blower	Make	<u> </u>	Model	<u> </u>	HP	<u> </u>
	Fan Size	<u> </u>	Piping	<u> </u>		

Heater	Make	<u> </u>	Model	<u> </u>	Serial #	<u> </u>
--------	------	-----------------------------	-------	-----------------------------	----------	-----------------------------

Dehumidifier	Make	<u> </u>	Model	<u> </u>	Serial #	<u> </u>
--------------	------	-----------------------------	-------	-----------------------------	----------	-----------------------------

Air Compressor	Make	<u> </u>	Model	<u> </u>	Serial #	<u> </u>
	HP	<u> </u>				

Pressure Switch	Make	<u> </u>	Model	<u> </u>	Pressure Range	<u> </u>
--------------------	------	-----------------------------	-------	-----------------------------	-------------------	-----------------------------

Wetwell Level Gauge	Make	<u> </u>	Range	<u> </u>
------------------------	------	-----------------------------	-------	-----------------------------

Peto Tube	Make	<u> </u>	Range	<u> </u>
-----------	------	-----------------------------	-------	-----------------------------

Site Condition		Fence		
		Yes	No	

Material	<u> </u>	Gate Size	<u> </u>	Service Gate Size	<u> </u>	Driveway	<u> </u>
						(Blacktop/Gravel/Concrete)	

Lift Station Site Survey

Pump Motor Info:

Pump #

Make _____ Model # _____ Serial # _____
Frame _____ Volts _____ Amps _____ Phase _____
HP _____ RPM _____

Pump #

Make _____ Model # _____ Serial # _____
GPM _____ TDH _____

Pump Assembly Impeller

Style _____ Diameter _____ Material Make _____
Wear Ring Yes _____ No _____ Size _____
Material Make _____

Manufacture Clearance

Pump Seal Style _____ Shaft Diameter _____ Seal # _____

Seal Housing Oil Capacity (Sub Only)

Volute Inlet Size _____ Outlet Size _____

Pump Sealing Flange Gasket/O-ring (Submersible Only)

Sealing Face Flange Size _____

Check Valves

Style _____ Make _____ Model _____
Size _____ Year _____ (Flange to Flange) _____

Pump Valves

Inlet Style _____ Make _____ Model _____
Size _____ Year _____ (Flange to Flange) _____
Outlet Style _____ Make _____ Model _____
Size _____ Year _____ (Flange to Flange) _____

Notes:

Pump Run Cycle Serial # _____

Lead On _____ Lead Off _____ Hours _____

Lag On _____ Lag Off _____ Pump #1 _____ Pump #26 _____

GENERATOR SITE SURVEY

SYSTEM# 0 **UNIT #** **DATE**

LOCATION NAME	0
---------------	---

LOCATION ADDRESS	0
------------------	---

SYSTEM CONTACT AND PHONE _____

<u>GENERATOR</u>	<u>EXERCISE CYCLE DAY AND TIME</u>
------------------	------------------------------------

MAKE	MODEL
<hr/>	<hr/>

MODEL # _____ SERIAL # _____

KW	AMPS	VOLTS	PHASE	KVA
----	------	-------	-------	-----

TRANSFER SWITCH MAKE _____

MODEL #	SERIAL #
---------	----------

BATTERY CHARGER

MODEL # _____ SERIAL # _____

AMPS	VOLTS
0.00	0.00
0.01	0.01
0.02	0.02
0.03	0.03
0.04	0.04
0.05	0.05
0.06	0.06
0.07	0.07
0.08	0.08
0.09	0.09
0.10	0.10
0.11	0.11
0.12	0.12
0.13	0.13
0.14	0.14
0.15	0.15
0.16	0.16
0.17	0.17
0.18	0.18
0.19	0.19
0.20	0.20
0.21	0.21
0.22	0.22
0.23	0.23
0.24	0.24
0.25	0.25
0.26	0.26
0.27	0.27
0.28	0.28
0.29	0.29
0.30	0.30
0.31	0.31
0.32	0.32
0.33	0.33
0.34	0.34
0.35	0.35
0.36	0.36
0.37	0.37
0.38	0.38
0.39	0.39
0.40	0.40
0.41	0.41
0.42	0.42
0.43	0.43
0.44	0.44
0.45	0.45
0.46	0.46
0.47	0.47
0.48	0.48
0.49	0.49
0.50	0.50
0.51	0.51
0.52	0.52
0.53	0.53
0.54	0.54
0.55	0.55
0.56	0.56
0.57	0.57
0.58	0.58
0.59	0.59
0.60	0.60
0.61	0.61
0.62	0.62
0.63	0.63
0.64	0.64
0.65	0.65
0.66	0.66
0.67	0.67
0.68	0.68
0.69	0.69
0.70	0.70
0.71	0.71
0.72	0.72
0.73	0.73
0.74	0.74
0.75	0.75
0.76	0.76
0.77	0.77
0.78	0.78
0.79	0.79
0.80	0.80
0.81	0.81
0.82	0.82
0.83	0.83
0.84	0.84
0.85	0.85
0.86	0.86
0.87	0.87
0.88	0.88
0.89	0.89
0.90	0.90
0.91	0.91
0.92	0.92
0.93	0.93
0.94	0.94
0.95	0.95
0.96	0.96
0.97	0.97
0.98	0.98
0.99	0.99
1.00	1.00
1.01	1.01
1.02	1.02
1.03	1.03
1.04	1.04
1.05	1.05
1.06	1.06
1.07	1.07
1.08	1.08
1.09	1.09
1.10	1.10
1.11	1.11
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1.22	1.22
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1.26	1.26
1.27	1.27
1.28	1.28
1.29	1.29
1.30	1.30
1.31	1.31
1.32	1.32
1.33	1.33
1.34	1.34
1.35	1.35
1.36	1.36
1.37	1.37
1.38	1.38
1.39	1.39
1.40	1.40
1.41	1.41
1.42	1.42
1.43	1.43
1.44	1.44
1.45	1.45
1.46	1.46
1.47	1.47
1.48	1.48
1.49	1.49
1.	

BATTERY ()

MAKE _____ **MODEL #** _____

CCA	CA	VOLTS
-----	----	-------

ENGINE

MAKE _____ MODEL _____

MODEL # _____ SERIAL # _____

CYLINDER _____ ARRANGEMENT # _____ HORSEPOWER _____

AIR FILTER () _____ **SPARK PLUGS ()** _____

OIL FILTER () _____ OIL () _____

FUEL FILTER () _____ FUEL TYPE _____

COOLANT FILTER () _____ COOLANT () _____

WATER SEPARATOR () _____

APPENDIX C SOFTWARE MATRIX

CMMS SOFTWARE INQUIRY

Definitions: STD (Standard Out of the Box), Custom (Requires Customization), Third (Requires Third Party Integration)

No.	Inquiry	STD (Y/N)	Custom (Y/N)	Third (Y/N)	Comments
	SOFTWARE (General)				
1.	Web Based software compatible with Internet Explorer, Chrome, Firefox				
2.	Can be hosted on local servers				
3.	Can provide a hosted solution (SAAS)				
4.	Can be hosted in a cloud environment and supports the use of SSL (HTTPS) for security				
5.	Microsoft SQL Server database				
6.	Allows the user to add new data fields to a screen without technical programming				
7.	Permits copy/paste functionality of record data entry				
8.	Allows adjustments to forms with tables/list boxes (i.e. increase the number of rows displayed etc.), based upon user preferences				
9.	Provides calendar pop-ups for all date fields				
10.	Ability to display multiple windows within the same system and treat any window as its primary display				
11.	The system supports upload of data, files, pictures, etc. in all modules.				

	Inquiry	STD Y/N	Custom Y/N	Third Y/N	Comments
12.	Supports a multi-user environment and provides data locking or buffering routines to prevent loss of information by simultaneous updates				
13.	Can access and launch custom web-services through the interface				
14.	Ability to have multiple domains for different departments				
15.	Users can easily modify the configurations in the set up				
16.	Users can easily create user defined fields in the set up				
17.	Integrated with ESRI Geographic Information System				
	SUPPORT				
18.	Technical support call be answered by a client service manager (in United States) during regular business hours				
19.	Technical support emails and online submittals will be responded to within one hour during regular business hours				
20.	System includes online help and/or tutorial videos				
21.	System provides a quick help feature (i.e., when the cursor is pointed at a field or button, standard field information such as the name, description, function, etc., is displayed)				
22.	Provide a comprehensive user manual documenting all operations of the software including sample reports, screen illustrations and instructions, and step-by-step training to teach non-technical and administrative personnel to operate system				
23.	Support contract includes free updates (builds/patches)				
24.	Support contract includes free version upgrades				

	Inquiry	STD Y/N	Custom Y/N	Third Y/N	Comments
25.	Automatically migrates all existing fields, including custom fields, to future releases				
26.	Technical user manuals can be provided to software administrator.				
	SECURITY				
27.	Has a Database Administration Module that allows a System Administrator to manage user access				
28.	The system assigns role-based security and user-based security				
29.	Establish security rights for each user group				
30.	Assign users to each user group and domain(s)				
31.	Active directory logins for desktop users that have unlimited site license				
32.	Saves user logins on mobile for auto logins				
	INTERFACES				
33.	Able to generate and export data in multiple formats (MS Excel, comma delimited, fixed width, etc.)				
34.	Seamlessly interfaces with MS Outlook, and allows users to send emails either through Outlook or through the CMMS				
35.	Seamlessly interfaces with ESRI-formatted (GIS) data				
36.	Uses a set of Application Programming Interfaces (APIs) to create interfaces to other applications				
37.	Integrates with Public Works current Oracle ver. 12.2.5				
38.	Integrates with CCTV inspection software (Wonderware)				
39.	Integrates with Accruent VFA.Facility Software				
40.	Integrates with SCADA				

	Inquiry	STD Y/N	Custom Y/N	Third Y/N	Comments
41.	Thresholds can be set for SCADA data to trigger PM's or WO's.				
42.	Historical data from Oracle EAM can be loaded into CMMS				
43.	Action buttons can be added to existing SCADA interface allowing users to create work orders from SCADA that automatically upload to proposed software solution				
	DASHBOARD				
44.	Customizable dashboard for functional roles including Maintenance Supervisor, Administrator, Utility Worker, Asset Managers, Inventory Manager, Operator				
45.	Business Intelligence metrics and graphs to monitor trends				
46.	Performance dials that presents Key Performance Indicators (KPIs) or metrics				
47.	Alerts can be sent be set up to dial and notify mobile phone numbers.				
	WORKFLOW				
48.	Supports user-configurable workflows that vary depending on the work order types and tasks				
49.	Ability to send email or text messages to pre-defined people (including external email addresses) based on different Work Order types, tasks or statuses				
50.	Provides for the ability to visually define workflow rules				
51.	Can send email or text messages to users to update them on a change to work order priority status.				
52.	Notify mobile users on their tablets for service requests, work orders and warehouse inventory. Notifications on the tablets will direct users to the actual item.				

	Inquiry	STD Y/N	Custom Y/N	Third Y/N	Comments
53.	Provides automatic notification of work completion (when work order is closed) to the work request originator				
	GIS INTERFACE				
54.	Main interface contains direct access to the GIS data via a map service published by ArcGIS for Server				
55.	Allows the user to select an asset(s) on the map and create a service request/work order/condition assessment/inspection against that asset				
56.	Allows users to enter an address and it identifies all the assets within a radius buffer distance				
57.	Provides the ability to search for assets by one or more GIS attributes				
58.	Allows users to update GIS attributes and will automatically update in GIS				
59.	Allows the user to print the current GIS display				
60.	Displays the location of service requests, work orders, condition assessment and inspections on the GIS				
61.	Allows users to change between List View and Map View to view the details of the asset(s)				
62.	Allows users to generate a GIS query by color coding all the assets that related to specific user defined parameters (i.e. work order types, tasks, supervisors, lead, causes)				
63.	The system allows users to generate a GIS query by color coding all the assets with an Asset Condition Index selected				
64.	Allows users to view attachments (i.e. videos, photos, documents) to the assets directly from the GIS interface				

	Inquiry	STD Y/N	Custom Y/N	Third Y/N	Comments
65.	Allows users to annotate in the GIS interface and save annotations to pdf				
66.	Allows GIS layers to be turned on and off as needed by user preferences				
	ASSET INVENTORY				
67.	Tracks asset purchase cost, asset replacement value and depreciated costs				
68.	Automatically inflate the asset replacement value annually by classes or globally				
69.	Generate book value and depreciated cost to comply with GASB 34 reporting requirements				
70.	Tracks purchase and installation dates				
71.	Tracks Asset Impact Index (consequence of failure)				
72.	Tracks Asset Probability Index (probability of failure)				
73.	Tracks Asset Condition Index (condition of assets)				
74.	Tracks asset useful life and remaining useful life				
75.	Shows GIS attributes on the asset inventory				
76.	Tracks asset warranty expiration date and flags users when work orders are created on an asset under warranty				
77.	Allows a thumbnail photo in the asset inventory				
78.	Allows users to either upload or create links to photos, documents, as built drawings and manufacturer O&M online manuals				
79.	Alerts if identical model/serial# is entered for multiple assets				
80.	Allows for asset cloning to quickly generate multiple new assets				

	Inquiry	STD Y/N	Custom Y/N	Third Y/N	Comments
81.	Establishes asset inventory in a hierarchy format that can include locations, sub locations, classes, subclasses, parent assets and child assets				
82.	Asset hierarchy can be grouped either by asset location or asset class				
83.	Assets can be dragged and dropped to different locations and classes on the asset hierarchy				
84.	Assets can be viewed on a list view or GIS map view				
85.	Allows unique attributes for different asset classes				
86.	Allows users to search asset records by number, name, description or address				
87.	Allows users to sort, filter and search fields in a table format				
88.	Shows any current and upcoming activities (i.e. work orders, preventive maintenance, condition assessment and inspection) related to the asset				
89.	Allows users to view and open historical work orders, preventive maintenance, condition assessments and inspections related to the asset				
90.	Tracks asset meter readings (i.e. run times, temperature, alarms)				
91.	Allows mobile assets to be checked in and out to employees				
92.	Functions that can be completed directly from the asset form view include, but are not limited to: the generation of reports, work orders, preventive maintenance, condition assessments and inspections				

	Inquiry	STD Y/N	Custom Y/N	Third Y/N	Comments
	SERVICE REQUESTS				
93.	Allows the call taker to bring up the location of a call on the GIS map				
94.	Allows the call taker to associate a call to an existing service request if the problem has been reported already				
95.	Allows users to link multiple service requests				
96.	Provides scripted call taking functionality (pre-defined questions the call taker must ask depending on problem type)				
97.	Track customer contact information, including name, address, phone and email				
98.	Provide access to a caller's history to identify repeat or frequent callers				
99.	Service request can be converted into a work order if required				
100.	Automatically send emails or text messages to external customers to keep them notified of service request status				
101.	Can import or integrate with customer information from an external billing system (Tyler Technologies) used by PW				
	WORK ORDERS				
102.	Can associate multiple assets to work order				
103.	Can associate an address to work order				
104.	Can select assets from a GIS to a work order				
105.	Can assign asset(s) from an asset hierarchy to work order				
106.	Able to associate a work order to an address and at a later date add an asset(s) to that work order				

	Inquiry	STD Y/N	Custom Y/N	Third Y/N	Comments
107.	Automatically closes the associated SR when the work order is closed				
108.	A single work order can initiate multiple tasks or check lists				
109.	Check lists can be checked off individually when completed on the work order				
110.	Tasks can be checked off individually when completed on the work order				
111.	Work orders can track job costing including labor, equipment, contractor, parts and miscellaneous costs.				
112.	A work order can have user-defined statuses (i.e. new, open, hold, cancel, complete, close)				
113.	Automatically transfer estimated labor, equipment and contractor hours to actual hours when work orders are closed				
114.	Able to generate a work order without a service request				
115.	Can easily display the entire work history of an asset				
116.	Allows for predefined check lists and standard operating procedures associated to work order tasks				
117.	Can create an invoice from a work order for contractual work				
118.	The status of completion for a multi-asset work order can be updated for an individual asset(s) within the work order without closing the entire work order				
119.	Tracks parts and materials used on work order and automatically removes from warehouse counts				
120.	Tasks or check lists can be added to a work order on-the-fly				
121.	For multi-asset work orders, the system is able to record costs separately for each asset within the work order				

	Inquiry	STD Y/N	Custom Y/N	Third Y/N	Comments
122.	Can assign different work priorities to work orders				
123.	Allows the user to select a group of work orders and perform certain batch function on them (e.g., print, open, close, assign, prioritize)				
124.	Provides online access to images and/or scanned files, photographs, etc. uploaded to the asset or work order				
125.	Allows work orders to be created from a predefined work order template or save as an existing work order				
126.	Allows work order to be assigned to a specific project				
127.	Allows unique user defined fields for different work order tasks				
	PREVENTIVE MAINTENANCE				
128.	The system can generate calendar-based PMs by daily, weekly, monthly, yearly and target schedules				
129.	The system allows seasonal PMs for specific months of the year				
130.	The system can track meter-based results and can chart the results for viewing trends.				
131.	The system allows multiple schedules (i.e. annual, quarterly, monthly) in one PM that allows users to prioritize and eliminate duplicate PMs				
132.	The system allows multiple schedules with unique check lists associated to different schedules in the PM				
133.	The system can generate email, text message or pop-up notifications to alert users that PMs are due				
134.	The system allows for customization of the PM work order format				

	Inquiry	STD Y/N	Custom Y/N	Third Y/N	Comments
135.	The system allows Predictive Maintenance work orders to be auto generated based on predictive parameters or triggers entered into asset readings				
136.	The system can integrate with SCADA to trigger PM activities based on run times, alarms and other triggers				
137.	The system can allow for detailed PM procedures (SOPs) to accompany each different PM or PM schedule				
138.	The system will auto generate group PM work orders by schedule or meter readings				
139.	The system can create a PM for a group of assets by selecting the assets from GIS				
140.	The system allows PM to be generated by identifying a Location and Class and it will automatically assign assets to the PM. System will automatically add or remove assets from the PM as the asset inventory gets updated for Location and Class.				
141.	The system will forecast and display the PM in a calendar view by day, week and month with the option to group by department and WO type				
142.	The system allows PM templates to be created which can be used for immediate, on-demand or automatic scheduling				
143.	The system will allow contractor assigned PMs to automatically email to contractors				
144.	The system will allow users to set prior days to generate the PM in advance for PMs that require longer lead coordination time				

	Inquiry	STD Y/N	Custom Y/N	Third Y/N	Comments
	JOB COSTING				
145.	The system can import wages from an external system for employee and equipment rates				
146.	The system allows users to define multiple rates (i.e. regular, overtime, standby) for each employee, equipment and contractor				
147.	The system can modify and update individual employee, material, and equipment cost line items on a work order				
148.	The system can perform batch updates of labor and equipment rates				
149.	The system tracks labor costing by employee, crew, role or General Ledger (GL) fund.				
150.	The system accommodates multiple wage rates per job class				
151.	For multi-asset work orders, the system tracks parts, employee, and equipment separately for each asset				
152.	For multi-task work orders, the system tracks parts, employee, and equipment separately for each task				
153.	The system is capable of tracking outside contractor costs on work orders				
154.	The system is capable of tracking materials that are not in the inventory (e.g., parts purchased via credit card) in a miscellaneous cost				
155.	With appropriate permissions, the system allows edits to any aspect of a closed work order, including re-opening the work order				

	Inquiry	STD Y/N	Custom Y/N	Third Y/N	Comments
156.	The system aggregates the total cost for each work order using employee, equipment, contractor, material and misc. costs				
157.	The system tracks projects				
158.	The system links multiple work orders to a project				
159.	The system rolls up costs for each of the work orders linked in the project				
160.	The system tracks budgeted costs versus actual costs for work orders				
161.	The system tracks budgeted costs versus actual costs for projects				
	PROJECT MANAGEMENT				
162.	Ability to create and track projects for cost				
163.	Ability to tag work orders to projects				
164.	Ability to view projects with summary view of costs from work orders, preventive maintenance, materials				
	CONDITION ASSESSMENT				
165.	Allows users to create condition assessment templates for each class of asset				
166.	Allows variables in the condition assessment templates to be weighted based on criticality				
167.	Allows users to select a condition assessment rating (1-5) for each variable				
168.	Automatically calculates an Asset Condition Index				
169.	The Asset Condition Index will be used to calculate the probability of failure of the asset and modify remaining useful life				

170.	Inquiry	STD Y/N	Custom Y/N	Third Y/N	Comments
171.	Allows users to upload photos, videos and reports related to the condition assessment				
172.	Seamlessly integrated with CCTV software to auto upload condition assessment records				
173.	Presents the condition assessments in list or map view in GIS				
	INSPECTION				
174.	Allows users to create custom inspection forms (i.e. operations, lab, valve exercise, hydrant, overflows, tree) for field data capture				
175.	Allows users to capture field data and attach to assets. Field data can be made trackable for charting purposes.				
176.	Generate custom reports from the inspection field data				
177.	Allows users to upload photos, documents and reports related to the inspections				
178.	Presents the inspections in list or map view in the GIS				
	RESOURCE MANAGEMENT				
179.	Track employees, billable rates, schedule and training				
180.	Track equipment to be billed out on work orders				
181.	Track vendors and associate parts supplied by vendors				
182.	Track contractors to be billed out and assigned on work orders				
183.	Timesheet module that compiles time entered into service requests and work orders				
184.	Allows users to modify timesheet and enter additional time onto timesheets				
185.	Timesheet approval process and ability to export to a financial system				

	Inquiry	STD Y/N	Custom Y/N	Third Y/N	Comments
186.	Ability to create crews that includes employees and equipment				
	WAREHOUSE INVENTORY				
187.	Values inventory using fixed cost, average cost, Last In First Out (LIFO) and First In First Out (FIFO)				
188.	Links vendors to parts inventory. Capable of storing custom vendor equipment numbers, and manufacturer numbers.				
189.	Allows a stock item to be issued or reserved to a work order				
190.	Organizes inventory by locations and sublocations				
191.	Organizes inventory by categories and subcategories				
192.	Allows stock to be returned to the warehouse and credit inventory quantities, account, and the specific work order originally charged against				
193.	Create Request for Quote for inventory to selected vendors. RFQ can be printed or emailed directly to vendors.				
194.	Generates a report for current inventory items that includes a count for each location and each warehouse				
195.	Tracks inventory in different locations				
196.	Can transfer parts inventory to different locations				
197.	Can transfer parts inventory to different employees				
198.	Allows batch updates to inventory quantities from cycle counting				
	PURCHASE REQUISITION				
199.	Stores multiple vendors capable of supplying the same piece of equipment				

	Inquiry	STD Y/N	Custom Y/N	Third Y/N	Comments
200.	Denotes the 'default vendor'				
201.	Stores vendor price quotes for stock items				
202.	Able to email vendors requesting quote				
203.	Automatically creates requisitions for parts based on minimum, maximum and reorder quantity triggers				
204.	Shows parts reserved once they are estimated in a work order				
205.	Shows parts for in stock, reserved and actual quantities by locations and employees				
206.	Can order inventory items on a credit card and receive into inventory.				
207.	Allows for electronic routing of requisitions for approval/sign-off				
208.	Displays the GL account, the work order number, the item number, and the description of the stock items on requisitions				
209.	Associates critical parts to assets				
	BARCODING/RFID				
210.	Supports the use of bar codes or QR codes				
211.	Vendor can provide bar codes or QR codes labels				
212.	Capability to print barcodes on asset or part inventory labels				
213.	Allows for customizable labels				
214.	Automatically generates and prints labels for asset inventory and parts inventory				
215.	Users can generate and print labels on demand				
216.	Compatible with RFID scanning				
	ASSET LIFECYCLE PLANNING				
217.	Allows users to create lifecycle plans for different asset classes				

	Inquiry	STD Y/N	Custom Y/N	Third Y/N	Comments
218.	Asset plans include Capital Expenditures (CAPEX) and Operating Expenditures (OPEX)				
219.	Maintenance, rehab and replacement activity expenditures are tracked as a percentage of asset replacement value				
220.	Presents asset lifecycle plan and useful life graph				
221.	Asset plans include user defined useful life and financial useful life				
222.	Asset plans allow users to set inflation value for each asset class				
	FUNDING FORECAST				
223.	Provides an asset management funding forecast (5, 10, 15, 20, 25 years) that can be represented graphically or in a list view				
224.	Presents funding projects grouped by each year				
225.	Ability to export funding forecasts into XLS or PDF				
	RISK MANAGEMENT				
226.	Ability to identify Asset Risk Index (1-100) for all assets or rolled up locations				
227.	Allows users to enter Asset Impact Index (1-10) for all assets. Uses Triple Bottom Line (Social, Environmental, Financial) criteria				
228.	System automatically calculates Asset Probability Index (1-10) for likelihood of asset failure				
229.	System automatically calculates Asset Condition Index (1-10) based on lifecycle or field condition for all assets				
230.	System automatically calculates Annual Maintenance Cost relative to Asset Replacement Value to trigger capital improvement				

	Inquiry	STD Y/N	Custom Y/N	Third Y/N	Comments
	CAPITAL PLANNING				
231.	Generates funding requirements compared to budget with risk graphs for each year				
232.	Present funding requirements with prioritization scores for each capital project				
233.	Ability to perform scenario planning by analyzing the consequences of different scenarios relative to risk				
234.	Ability to save scenarios and retrieve later				
235.	Ability to generate Capital Improvement Project Work Orders to track progress				
236.	Ability to defer capital projects based on budgets and scenarios				
	REPORTING & QUERYING				
237.	Generates productivity and cost analysis reports by task, period, job, location and crew				
238.	Makes all data elements available for inquiry and report through the report writing function, including user-defined fields				
239.	Has standard reports for all modules				
240.	Allows ad-hoc reporting where users can design and format reports				
241.	Allows "push reporting" where reports can be emailed to recipients based on a schedule (daily, weekly, monthly)				
242.	Allows users to save favorite reports				
243.	The ad hoc reporting module provides the user the ability to select query options from one or more database tables				

	Inquiry	STD Y/N	Custom Y/N	Third Y/N	Comments
244.	Generates user-defined form letters (i.e., notification letters to customers as to the status of complaint processing)				
245.	Reports can be generated in a variety of file types, including but not limited to PDF, XLSX, XML, RTF or CSV				
246.	Presentation reporting templates available				
247.	Querying can be performed through the CMMS and displayed on the GIS. Queries may include service requests, work orders, preventive maintenance and asset condition index.				
248.	Querying can be performed through the GIS and displayed within the CMMS				
	MOBILE				
249.	Mobile application compatible with Apple iOS and Android				
250.	Mobile app must include asset inventory, GIS, work order, service request, inventory, condition assessment and inspection modules				
251.	Mobile app allows access to assets via GIS				
252.	Mobile app uses location services on mobile devices to show current location on GIS				
253.	Mobile app allows users to access and view GIS attributes				
254.	Mobile app can create, update, and complete service requests and work orders				
255.	Mobile app has notification services to inform users of updates and assignments of service requests and work orders				
256.	Mobile app can show service requests and work orders on list or map view in GIS				

	Inquiry	STD Y/N	Custom Y/N	Third Y/N	Comments
257.	Mobile app provides ability to view electronic documents attached to assets, work orders or service requests via mobile device				
258.	Mobile app allows users to retrieve historical work orders, condition assessment and inspections for assets				
259.	Mobile app allows users to create work orders, condition assessment and inspections from scanning an asset barcode or QR code				
260.	Mobile app provides ability to capture and attach photos to a service request or work order via mobile device				
261.	Mobile app uses the mobile device's built-in camera to scan barcodes or QR codes to pull up records				
262.	Mobile app allows inventory management including cycle counting and updates actual counts				
263.	Mobile app allows inventory parts management including transfer of parts to locations or employees				
	SERVICE REQUEST PORTAL & MOBILE APPLICATION				
264.	The system provides a way for customers or workers to enter service requests from an external web portal				
265.	Service requests submitted through the external web portal can be pushed to the proposed software's inbuilt service request module				
266.	Customers can receive updates on the status of their submitted service requests				
	Customers can subscribe to open service requests to track progress of service requests submitted by other users				

	Inquiry	STD Y/N	Custom Y/N	Third Y/N	Comments
268.	Service request web portal is map based				
269.	Customer Service Request App on iOS and Android for customers to generate service requests from mobile devices. Service requests automatically generated in the system. Mobile app can be custom branded with organizational logo.				
270.	Customer Service Request App can utilize mobile cameras to take photos and be uploaded with the service request				
271.	Customer Service Request App utilize location services on mobile devices to mark coordinates for service requests				
	IMPLEMENTATION SERVICES				
272.	The vendor offers comprehensive implementation services including user requirements, business process mapping, data migration, configuration, mobile, integration and training				
273.	The vendor offers access to a web-based system, or installation of software on client server				
274.	The vendor uses Web Application Program Interface (API) for integration with other information systems				
275.	The vendor has ability to import data from Microsoft Access, Microsoft Excel or existing EAM system				
276.	The vendor offers remote or onsite training of users and administrators according to organizational needs				
277.	The vendor provides customer service for software upgrades				
278.	The vendor will create custom forms during software configuration and specific users will also be trained on how to create and use custom forms.				