**SAN FRANCISCO CITY AND COUNTY TECHNOLOGY MARKETPLACE**

**REQUEST FOR PROPOSAL**

# Maximo Needs Assessment Sourcing Event 0000000623, v. 1

RFP Contact:

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XXXXXXXXXXXXXXXXXXXXXXXX

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BACKGROUND

The San Francisco Public Utilities Commission (SFPUC), a department of the City and County of San Francisco, is the third largest municipal utility in California. It serves 2.4 million residential, commercial, and industrial customers in the greater San Francisco Bay Area. The SFPUC system provides four distinct services: Regional Water, Local Water, Wastewater and Power.

This Request for Proposal (RFP) has been prepared for the City Distribution Division (CDD) of the SFPUC Water Enterprise (WE). At this time, CDD seeks to purchase specialized Maximo assessment services to complete a Needs Assessment on how CDD currently uses the functionalities of Maximo to improve Asset Management practices and to prepare for implementation of a mobile application and interfacing to GIS.

**Purchase Type ...............................** Technical Services

**Target Start Date** ...............................April 2018

# Not To Exceed Amount................... $35,0000

RFP SCHEDULE

Request for Proposal Issued ..........................February 15, 2018, 2017

Deadline for Questions ..................................March 2, 2018 (5:00 pm, PST) Deadline for Response to Questions .............March 7, 2018 (5:00 pm, PST) Deadline for Proposals...................................March 14, 2018 (5:00 pm, PST)

QUESTIONS

Please email your questions to XXXXXXXXXXXXXXX. A copy of all Supplier questions and SFPUC responses to those questions will be sent to all Suppliers who accepted this invitation to bid.

DESCRIPTION OF SFPUC ENVIRONMENT

Maximo Version 7.5.0.4 moving to latest version of 7.6. in Q4 2018 with a desire to evaluate the use of Maximo scheduler, Anywhere, and Everyplace. Maximo has been implemented enterprise wide where CDD operates as one site within the Maximo SFPUC organization.

SCOPE OF WORK

# Task 1: Project Management

Work collaboratively with the SFPUC to provide oversight of the Maximo Assessment project. Responsibilities include:

* Developing and Managing the Project Schedule.
* Managing the Vendor Resources.
* Preparing Change Orders (if necessary).
* Developing Agenda and Meeting Minutes.
* Developing Invoices and Budget Reports.

# Deliverables:

1. Weekly status reports
2. Project schedule and periodic updates
3. Meeting agenda and minutes
4. Monthly invoices

# Task 2: “As Is” Maximo Usage and Assessment

Meet onsite with SFPUC to review the current usage of Maximo, CDD’s business needs, and SFPUC’s overall Maximo version upgrade plans. The assessment will likely include a series of workshops with topics to be determined by Vendor including but not limited to:

* + Data currently in Maximo.
  + Maximo user roles.
  + Examining existing and proposed workflows with the intent of integrating with GIS geodatasets.
  + Business needs for scheduling and tracking work and managing assets in Maximo.
  + Data in spreadsheets or any other sources that should be incorporated into Maximo.
  + Maximo applications to document configurations to be preserved or retired.
  + Any ongoing or desired SFPUC Maximo improvement projects or Maximo upgrade plans.
  + Specific projects that use different Maximo work order relationships, classifications, and status tracking.
  + Training Guides.
  + Existing and desired interfaces, reporting, classification, licensing, infrastructure, and procedures.

# Deliverables:

1. Workshop agendas and follow up notes

# Task 3: Assessment Report, Gap Analysis, and Roadmap

Develop a “Findings and Recommendations” report and SFPUC roadmap for Maximo improvements based on the current practices and business needs assessment conducted in Task 2. Vendor should operate under the assumption that SFPUC desires to utilize Maximo as out-of-the-box, as possible.

# Deliverables include, but not limited to:

1. “As Is” Findings and Road Map Recommendations Report with Gap Analysis Outcomes and Recommended Roadmap.
2. Findings and Recommendations Review Workshop and follow up Report.

RESPONSE EVALUATION

Responsive Proposals will be evaluated in accordance with the Bid Factors listed below.

BID FACTOR 1: QUALIFICATIONS

* + Total Available Points: 0-100
  + Weighting: 40%

1. Technology Marketplace vendor resource must submit company and staff profiles or resumes of key personnel who will be assigned to this project, along with relevant product and project experience from the consulting and system integration standpoint. Profiles/resumes must demonstrate a verifiable history of successfully working with the Maximo platform and knowledge of Utility practices similar to those for which CDD currently or desired to manage with Maximo. (70 Points)
2. Technology Marketplace vendor must also provide 2 verifiable references of successful Needs Assessments that have been used by Clients to improve their practices. (30 Points)

*Any proposal that does not submit a complete response to this section shall be deemed non- responsive and rejected.*

BID FACTOR 2: SCOPE OF WORK

* + Total Available Points: 0-100
  + Weighting: 40%

Technology Marketplace vendor resource must submit a detailed scope of work describing the services, schedule, and milestones that will be provided for the tasks in the Scope section of this RFP. (100 Points)

*Any proposal that does not submit a complete response to this section shall be deemed non- responsive and rejected.*

BID FACTOR 3: AVERAGE HOURLY RATE

* + Total Available Points: 0-100
  + Weighting: 10%

Responsive proposals will be evaluated by their weighted average hourly rate across all Tasks. A maximum of 100 points will be attributed to the responsive bidder with the lowest average hourly rate. The total points assigned to each subsequent responsive bidder will be 100 points reduced by the total percentage by which that bid exceeds the lowest responsive bidder.

# Average Hourly Rate Calculation:

For each Task identified in Section 1, you must provide resource types, hourly rates and estimated number of hours by resource type. **Please use the following example as the format by which to provide this information for each Task.**

***Example:***

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Task 1** | **Resource Type** | **Hrly rate** | **No. of Hrs** | |  | **Total Cost** |
|  | IS Engineer | 150 |  |  | 500 | $75,000 |
|  | Programmer | 100 |  |  | 500 | $50,000 |
|  |  | Total |  | 1,000 | | $125,000 |
|  |  | Average Hour | | ly Rate: | | $125 (Total Cost/Total Hrs) |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Task 2** | **Resource Type** | **Hrly rate** | **No. of Hrs.** |  | **Total Cost** |
|  | IS Engineer | 150 |  | 10 | $1,500 |
|  | Programmer | 100 |  | 10 | $1,000 |
|  |  | Total |  | 20 | $2,500 |

Average Hourly Rate:

$125 (Total Cost/Total Hrs)

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  | |  |  |
| **Task 3** | **Resource Type** | **Hrly rate** | **No. of Hrs.** | |  | **Total Cost** |
|  | IS Senior Engineer | 200 |  |  | 100 | $20,000 |
|  | Programmer | 100 |  |  | 100 | $10,000 |
|  |  | Total |  |  | 200 | $30,000 |
|  |  | Average Hour | | ly Rate: | | $150 (Total Cost/Total Hrs) |
|  |  |  |  | | |  |

*Any proposal that does not submit a complete response to this section shall be deemed non- responsive and rejected.*

**Average Hourly Rate Across Tasks 1, 2 and 3:**

**$133**

BID FACTOR 4: TOTAL PROJECT COST

* + - Total Available Points: 0-100
    - Weighting: 10%

1. Technology Marketplace vendor must submit a quote that details the total cost of all technical services and projected travel costs, if any, as per CONUS guidelines. **SFPUC will pay for services based on a time and material basis.**
2. A maximum of 100 points will be attributed to the Lowest Responsive Bidder. The total points assigned to each subsequent responsive bidder will be 100 points reduced by the total percentage by which that bid exceeds the Lowest Responsive Bidder.

*Any proposal that does not submit a complete response to this section shall be deemed non- responsive and rejected.*

OTHER TERMS AND CONDITIONS

* 1. There is no guarantee of a minimum amount of work or compensation.
  2. The City reserves the right to accept other than the lowest price offered and to reject any or all proposals.
  3. The City, in its sole discretion, has the right to approve or disapprove any staff assigned to a firm’s project for the SFPUC.
  4. The City reserves the right at any time to approve, disapprove, or modify proposed project plans, timelines and deliverables.