City of Marco Island:

Enterprise Asset and Work Management System (EAM)

System Ranking:

All systems have been ranked from 1-6, with the lowest average score determining the selection.

- **Cartegraph** (Ranked 1.20), is the top ranked system recommended by the selection committee.

Selection Process:

- **November 3, 2020**, the selection process was kickoff with the development of the selection committee (below).
- The committee attended system demos for six (6) different EAM solutions; if a committee member missed a meeting, they were required to watch the recorded demo (if available) for their score to count on the final ranking.
    - One member of the committee has their scores removed due to their inability to attend all the demos
- Conducted six (6) system demonstrations
- **November 30, 2020**, the committee meet to conduct a system review and answer any questions that may be needed prior to ranking each vendor.
- **December 2, 2020**, a ranking sheet was provided to all committee members, along with estimated system implementation costs.
- **December 4, 2020**, all committee members individually ranked the systems and submitted their results to the Manager of Fleet and Facilities (results can be found below).

Selection Committee:

1. Miguel Carballo, **Executive Department**, Manager of Fleet & Facilities
2. Casey Lucius, **Executive Department**, Assistant to the City Manager
3. Jose Duran, **Information Technology Department**, Director
4. Tim Pinter, **Public Works Department**, Director
5. Jeff Poteet, **Water & Sewer Department**, General Manager
6. Chris Byrne, **Fire Rescue**, Fire Chief
7. Raul Perez, **Building Services Department**, Building Official
8. Martha Montgomery, **Parks & Recreation Department**, Supervisor of Parks Facilities
9. Eric Dial, **Water & Sewer Department**, Manager of Maintenance Operations
10. Susie Hernandez, **Water & Sewer Department**, Administrative Assistant
11. David Baer, **Police Department**, Police Captain

Benefits of Enterprise Asset Management System:

- Life-Cycle tracking of City-wide assets
- Capital planning based on data
- Work management and optimization of operations
- Real-time asset tracking
- Transparency of business operations
- Contactor management
- Preventative maintenance scheduling via automation
- Inspection tracking and compliance
- Minimization of asset breakdowns and interruptions of services to the community
- Cost savings through improved maintenance and streamlined operations
- Energy savings through improved maintenance
- Level of service improvements city-wide by improving work distribution evenly throughout all city assets
- Improved Access to maintenance resources
- Improved reporting
- Real-time work order updates
- Access to historical maintenance records for grants and reporting
- Foundation for Vehicle Analysis and utilization management of fleet.

Cost & Proposed Implementation:

A phased implementation is recommended for the system with a small initial implementation this fiscal year for the fleet, facilities, and parks & recreation programs. Phase one will lay the system foundation and train staff for the more extensive process of implementing this software within the Water & Sewer and Public Works Departments.

Phase 1:

Phase 1	Software Subscription	Implementations Services	TOTAL PHASE 1
OMS Plus	$6,000.00		
Fleet	$0.00		
Parks	$895.00		
Facilities	$2,000.00		
7 Users	$3,500.00		
System TOTALS	**$12,395.00**	**$17,225.00**	**$29,620.00**
Equipment Costs*			**$5,880.00**
Total:			**$35,500.00**
Phase 1.1 Munis integration	**Software Suport**	**Implementations Services**	**TOTAL PHASE 1.1**
TOTALS	**$2,400.00**	**$6,500.00**	**$8,900.00**
		Phase I Total:	**$44,400.00**

Supplemental Options:

The estimates provided above is to implement the EAM system and does not include added the following supplementary options:

- Space Management System (with COVID-19 Tool)
  - $15,000.00 Annual Cost with $250 Per User Fee
- API Tyler Munis Integration (Link-To Backup)
  - Estimated cost of $8,000 in implement with a $2,000 annual support fee.
- Verizon Fleet Integration
  - Estimated cost of $3,000 to Implement with a $2,000 annual support fee.

Equipment Cost:

It is recommended to outfit field staff with a City issued devices, which will be needed for them to open & close work orders, conduct asset assessments, log time, etc. These devices will cost approximately $399.00 and the monthly service fee is $35.99 per employee. Example (Phase I): first year is $5,816.16 and $3,023.26 every subsequent year until new phones are needed.

Phases 2 & 3:

Phase 2	Software Subscription	Implementations Services	TOTAL PHASE 2
Water Distribution	$ 2,000.00		
Wastewater Collection	$ 2,000.00		
Water Treatment	$ 2,000.00		
Wastewater Treatement	$ 2,000.00		
56 Users	$ 16,960.00		
System TOTALS	**$24,960.00**	**$22,945.00**	**$47,905.00**
Equipment Costs*			$46,529.28
Total:			$94,434.28

Phase 2	Software Subscription	Implementations Services	TOTAL PHASE 2
Transportation	$ 1,611.00		
Walkability	$ 537.12		
Stormwater	$ 1,611.00		
12 Users	$ 6,000.00		
System TOTALS	**$9,759.12**	**$22,425.00**	**$32,184.12**
Equipment Costs*			$9,970.56
Total:			$42,154.68
TOTAL ALL PHASES	**$49,514.12**	**$69,095.00**	**$118,609.12**

Scope of Work:

The City of Marco Island requires a software solution to support and provide a full-scale implementation of an Enterprise Asset and Work Management System (EAM) with associated functionality, including but not limited to the following:

Required:
- Intuitive User Interface (Ease of Use)
- Asset Management
- Inventory and Work Management System (with Mobile Solution)
- Customer Management System
- Capital Improvement generation at short-term and long-term intervals
- Competitive Price

Preferred:
- Cloud Hosted
- Integration with City Financial System (Tyler Munis)
- SQL Database

Optional:
- Space Management
- Meeting Space Management
- Visitor Management

The intent is to maximize efficiencies by procuring an integrated system that can function as an "off-the-shelf" product that incorporates best practices but provides the option for the City to change the configuration of processes without changing the source code it there is a future business or legal requirement.

The enterprise asset management system will be an interactive, data-intensive program that builds upon itself each year. This system shall assist the City in achieving the following:

- The development of a framework and implementation of a systematic process to cost-effectively operate, maintain and upgrade the City of Marco Island's physical assets
- The analysis of an asset's condition, service impact, useful life, and preventative & reactive maintenance records.
- Development of tools to facilitate an organized, logical approach to decision making.
- Improved prioritization of capital improvement and operating expenditures.
- Certified compliance with all regulations.

This information will be used for the objectively based restoration, rehabilitation forecasting, and short-term and long-term planning of the City's fixed assets in coordination with the Council approved strategic plan.

Provided - Detailed Checklist:

Required:

- ☐ Intuitive User Interface (Ease of Use)
- ☐ Asset Management (Asset Life Cycle Tracking)
- ☐ Work Management System (with Mobile Solution)
- ☐ Preventative Maintenance Scheduling
- ☐ Inventory Management
- ☐ Customer Management Portal
- ☐ Capital Improvement generation at short-term and long-term intervals
- ☐ Customer Reporting Tool
- ☐ Competitive Price

Preferred:

- ☐ Cloud Hosted vs. City Hosted
- ☐ Integration with City Financial System (Tyler Munis)
- ☐ Database (SQL / GIS / Etc.)
- ☐ GPS Vehicle Tracking (API for Verizon Connect)
- ☐ Water & Sewer Capabilities
- ☐ Public Works Capabilities

Optional:

- ☐ Space Management
- ☐ Meeting Space & Visitor Management