



# County of Monterey

Item No.

## Budget Committee

Board of Supervisors  
Chambers  
168 W. Alisal St., 1st Floor  
Salinas, CA 93901

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a. Receive a presentation on maintenance and asset management program goals for the Department of Public Works, Facilities and Parks (PWFP).

### RECOMMENDATION:

It is recommended that the Budget Committee receive a presentation on maintenance and asset management program goals for the Department of Public Works, Facilities and Parks (PWFP).

### SUMMARY

Public Works, Facilities and Parks staff has identified the need to replace current paper and manual service request and preventative maintenance management with a standardized, electronic system. A software solution would manage service requests, collect data on asset conditions and costs, and monitor preventative maintenance resulting in a more efficient allocation of staff and funding.

To address this need, staff began a search for what is commonly referred to as a Computerized Maintenance Management System (CMMS). After a detailed RFP process, staff has tentatively awarded a vendor and submitted a request for program funding in the FY 2025/26 Capital Improvement Program 5-Year Plan. This report is informational only and is intended to give the Budget Committee background on the CMMS program need. Should the Board fund the CMMS project in FY 2025/26, staff would finalize contract negotiations with the vendor (PSD Citywide) and begin implementation.

### DISCUSSION:

#### **Snapshot of PWFP Maintenance Work**

Public Works, Facilities and Parks (PWFP) is responsible for maintenance and repair of more than 2,500,000 square feet of County-owned facilities across 96 structures, 55 County Landlord Leases, 511 Owned Parcels, 1,262 miles of County roads, 175 County maintained bridges, road appurtenances, signals, and management of 30,130 acres in Regional Parks and Open Spaces.

The approximately 150 PWFP staff dedicated to maintaining these County assets, including field crews, admin staff, and supervisors, are tasked with performing a significant volume of work. As an example, in calendar year 2024, the approximately 30 Facilities maintenance staff were involved in response to 6,968 service requests from the public and County employees, 2,062 preventative maintenance tasks, 281 locksmith requests (keys, locked doors/cabinets, etc.) 2,316 grounds and landscaping requests, and 318 after-hours facility requests. This equates to Facilities staff responding to 54 requests every day, Monday through Friday, every week of the year. Roads & Bridges, and Parks staff handle an equally large volume of work in their respective divisions. This preventative and

corrective maintenance workload is in addition to the various capital projects managed by PWFP Project Managers for larger repair and maintenance work.

### **Current Processes and Needed Improvements**

To manage this ever-increasing workload, staff use a mixture of paper forms, manual data entry processes, whiteboard scheduling, and staff knowledge to address requests and complete preventative maintenance. This legacy “system” is creating inefficiencies, inaccuracies and missed opportunities for data-driven decision-making where future resources should be allocated. Staff are unable to track work in the field in real-time, electronically report field conditions and other service needs discovered while working, or centrally catalog assets, manuals, drawings, etc., for in-field use.

Staff recognizes the need for a standardized electronic maintenance and asset management system to address these issues. This type of software is commonly known as Computerized Maintenance Management System (CMMS).

### **The Need for a CMMS**

In July 2020, the Board of Supervisors received and accepted the *Citygate Associates* Report, that detailed process improvements for the then-Resource Management Agency (subsequently split into PWFP and Housing and Community Development [HCD]) and included recommendations for the implementation of a Countywide asset management system, work order management system and in-field access system (Recommendations 55, 56 and 57).

A CMMS will provide an efficient system to manage preventative maintenance and maintenance requests. The system would be configured to follow best practices in a cost effective, efficient manner and would begin building a data set useful for long term asset lifecycle management. The software would schedule and track maintenance tasks, manage work orders, monitor the performance of equipment, and maintain asset data and records such as history of work performed on a piece of equipment or road section. These CMMS functions ensure regularly occurring and effective maintenance is performed which in turn enables efficiency improvement, reduction of downtime, extension of asset life, improved service delivery, and provides data to develop a more accurate Capital Improvement Program (CIP).

### **CMMS Progress and Current Status**

In FY 2022-23, PWFP identified CMMS as a departmental goal and began the process of developing a roadmap for implementation.

In April 2023, PWFP hired a consultant with experience in implementing CMMS to assist in evaluating department needs, develop functional and technical specifications for a CMMS software Request for Proposal (RFP), and provide support during the RFP process.

In June 2024, PWFP issued RFP #10936 to solicit proposals for CMMS Software and Implementation Services and received 12 proposals. After a lengthy and complex evaluation process, PSD Citywide was selected and issued a tentative award. Funding is now needed to implement the CMMS Program which includes CMMS software, mobile devices and staffing. A preliminary funding request of \$910,980 was included in the draft FY 2025/26 Capital Improvement Plan as an unfunded

project. This funding request will be updated as staff's cost projections are finalized. Ongoing operations and maintenance costs are not included in this preliminary funding request for implementation of the CMMS system.

### **Asset Management Policies and CMMS**

CMMS as a software solution is only one part of PWF's effort to implement preventative maintenance and asset management best practices. A software solution is only as good as the data and workflows put into it. PWF has been researching industry best practices, and potential consultant services to develop a suite of Standard Operating Procedures (SOPs) and asset management guidance which would ensure the CMMS is utilized to its greatest potential. Developing an Asset Management Policy, standardizing data management and work assignments within a CMMS will also play a large role in developing and refining these best practices.

### **Next Steps**

Implementation will consist of software costs, staff time, and initial equipment purchases to launch the CMMS. There will be annual software subscription fees, system administration staff time, and periodic equipment replacement to plan for.

This report is informational only and is intended to give the Budget Committee background on the CMMS program need. Should the Board fund the CMMS project in FY 2025/26, staff will finalize contract negotiations with the PSD Citywide and begin implementation.

### **OTHER AGENCY INVOLVEMENT:**

PWF Staff worked with ITD to develop software security requirements. Staff also interviewed representatives from multiple State and local agencies currently using a variety of CMMS solutions to gather lessons learned.

### **FINANCING:**

Receiving the report will have no effect on the County General Fund.

A CMMS Program offers several cost savings and efficiency benefits to the County:

**Cost Savings:** The proactive management of maintenance schedules and asset performance tracking will enable PWF to reduce costly emergency repairs, unplanned downtime and overall maintenance costs;

**Data-Driven Decisions:** More informed budget, resource allocation and equipment replacement decisions with the asset performance data, maintenance history and cost tracking that a CMMS provides;

**Improved Accountability and Transparency:** Records and tracking of who is responsible for each maintenance task, repair statuses, and associated costs of maintenance activities supports improved accountability and transparency.

Staff prepared annual CMMS administration cost estimates based on estimated staff, equipment and license fees. Startup costs to purchase tablets and laptops for field staff, implement CMMS software, and charge key staff time to the project is estimated to cost \$680,000. Some of these equipment purchases could be spread out over several years. Additional asset management best practice services

are offered for approximately \$112,000. Annual costs for system admins to charge staff time to the program, annual license fees, and 5% equipment replacement rate is estimated at \$230,000, increasing slightly each year based on employee MOUs and inflation rates.

Program costs would be divided between Facilities, Parks and Road & Bridges budgets. Funding from Road Fund would supplement funding from General Fund sources. As staff becomes familiar with CMMS and work more automated, admin staff time may be reduced. A breakdown of estimated Program costs across five years is outlined in Attachment A.

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Attachments:

Attachment A - CMMS Program Cost Estimate

Attachment B - Software Presentation