

COUNTY OF MONTEREY STANDARD AGREEMENT

This **Agreement** is made by and between the County of Monterey, a political subdivision of the State of California (hereinafter “County”) and:

PSD Citywide (US) Inc.

(hereinafter “CONTRACTOR”).

In consideration of the mutual covenants and conditions set forth in this Agreement, the parties agree as follows:

1.0 GENERAL DESCRIPTION:

The County hereby engages CONTRACTOR to perform, and CONTRACTOR hereby agrees to perform, the services described in **Exhibit A** in conformity with the terms of this Agreement. The goods and/or services are generally described as follows:

Provide: Computerized Maintenance Management software licensing, implementation and customer service for Citywide Enterprise Asset Management (EAM) Software including Citywide Maintenance and Citywide Assets Modules as procured under RFP #10936.

2.0 PAYMENT PROVISIONS:

2.01 County shall pay the CONTRACTOR in accordance with the payment provisions set forth in **Exhibit A**, subject to the limitations set forth in this Agreement. The total amount payable by County to CONTRACTOR under this Agreement shall not exceed the sum of:
\$ 1,000,000

3.0 TERM OF AGREEMENT:

3.01 The term of this Agreement is from October 15, 2025 to October 14, 2030, unless sooner terminated pursuant to the terms of this Agreement. This Agreement is of no force or effect until signed by both CONTRACTOR and County and with County signing last, and **CONTRACTOR may not commence work before County signs this Agreement.**

3.02 The County reserves the right to cancel this Agreement, or any extension of this Agreement, without cause, with a thirty day (30) written notice, or with cause immediately.

4.0 SCOPE OF SERVICES AND ADDITIONAL PROVISIONS:

The following attached exhibits are incorporated herein by reference and constitute a part of this Agreement:

Exhibit A Scope of Services/Payment Provisions

Exhibit B Other: Assignment and Subcontracting

Exhibit C: PSD Citywide Proposal in Response to RFP #10936

Exhibit D: PSD Citywide Proposal for Services for Public Works Division

Exhibit E: Additional Terms

5.0 PERFORMANCE STANDARDS:

- 5.01 CONTRACTOR warrants that CONTRACTOR and CONTRACTOR's agents, employees, and subcontractors performing services under this Agreement are specially trained, experienced, competent, and appropriately licensed to perform the work and deliver the services required under this Agreement and are not employees of the County, or immediate family of an employee of the County.
- 5.02 CONTRACTOR, its agents, employees, and subcontractors shall perform all work in a safe and skillful manner and in compliance with all applicable laws and regulations. All work performed under this Agreement that is required by law to be performed or supervised by licensed personnel shall be performed in accordance with such licensing requirements.
- 5.03 CONTRACTOR shall furnish, at its own expense, all materials, equipment, and personnel necessary to carry out the terms of this Agreement, except as otherwise specified in this Agreement. CONTRACTOR shall not use County premises, property (including equipment, instruments, or supplies) or personnel for any purpose other than in the performance of its obligations under this Agreement.

6.0 PAYMENT CONDITIONS:

- 6.01 Prices shall remain firm for the initial term of the Agreement and, thereafter, may be adjusted annually as provided in this paragraph. The County does not guarantee any minimum or maximum amount of dollars to be spent under this Agreement.
- 6.02 Negotiations for rate changes shall be commenced, by CONTRACTOR, a minimum of ninety days (90) prior to the expiration of the Agreement. Rate changes are not binding unless mutually agreed upon in writing by the County and the CONTRACTOR.
- 6.03 Invoice amounts shall be billed directly to the ordering department.
- 6.04 CONTRACTOR shall submit such invoice periodically or at the completion of services, but in any event, not later than 30 days after completion of services. The invoice shall set forth the amounts claimed by CONTRACTOR for the previous period, together with an itemized basis for the amounts claimed, and such other information pertinent to the invoice. The County shall certify the invoice, either in the requested amount or in such other amount as the County approves in conformity with this Agreement and shall promptly submit such invoice to the County Auditor-Controller for payment. The County Auditor-Controller shall pay the amount certified within 30 days of receiving the certified invoice.
- 6.05 CONTRACTOR shall not receive reimbursement for mileage or travel expenses unless set forth in this Agreement.

7.0 TERMINATION:

- 7.01 During the term of this Agreement, the County may terminate the Agreement for any reason by giving written notice of termination to the CONTRACTOR at least thirty (30) days prior to the effective date of termination. Such notice shall set forth the effective date of termination. In the event of such termination, the amount payable under this Agreement shall be reduced in proportion to the services provided prior to the date of termination.

- 7.02 The County may cancel and terminate this Agreement for good cause effective immediately upon written notice to CONTRACTOR. "Good cause" includes the failure of CONTRACTOR to perform the required services at the time and in the manner provided under this Agreement. If County terminates this Agreement for good cause, the County may be relieved of the payment of any consideration to CONTRACTOR, and the County may proceed with the work in any manner, which County deems proper. The cost to the County shall be deducted from any sum due the CONTRACTOR under this Agreement.
- 7.03 The County's payments to CONTRACTOR under this Agreement are funded by local, state and federal governments. If funds from local, state and federal sources are not obtained and continued at a level sufficient to allow for the County's purchase of the indicated quantity of services, then the County may give written notice of this fact to CONTRACTOR, and the obligations of the parties under this Agreement shall terminate immediately, or on such date thereafter, as the County may specify in its notice, unless in the meanwhile the parties enter into a written amendment modifying this Agreement.

8.0 INDEMNIFICATION:

CONTRACTOR shall indemnify, defend, and hold harmless the County, its officers, agents, and employees, from and against any and all claims, liabilities, and losses whatsoever (including damages to property and injuries to or death of persons, court costs, and reasonable attorneys' fees) occurring or resulting to any and all persons, firms or corporations furnishing or supplying work, services, materials, or supplies in connection with the performance of this Agreement, and from any and all claims, liabilities, and losses occurring or resulting to any person, firm, or corporation for damage, injury, or death arising out of or connected with the CONTRACTOR's performance of this Agreement, unless such claims, liabilities, or losses arise out of the sole negligence or willful misconduct of the County. "CONTRACTOR's performance" includes CONTRACTOR's action or inaction and the action or inaction of CONTRACTOR's officers, employees, agents and subcontractors.

9.0 INSURANCE REQUIREMENTS:

- 9.01 **Evidence of Coverage:** Prior to commencement of this Agreement, the Contractor shall provide a "Certificate of Insurance" certifying that coverage as required herein has been obtained. Individual endorsements executed by the insurance carrier shall accompany the certificate. In addition, the Contractor upon request shall provide a certified copy of the policy or policies.

This verification of coverage shall be sent to the County's Contracts/Purchasing Department, unless otherwise directed. The Contractor shall not receive a "Notice to Proceed" with the work under this Agreement until it has obtained all insurance required and the County has approved such insurance. This approval of insurance shall neither relieve nor decrease the liability of the Contractor.

- 9.02 **Qualifying Insurers:** All coverages, except surety, shall be issued by companies which hold a current policy holder's alphabetic and financial size category rating of not less than A- VII, according to the current A.M. Best's Rating Guide or a company of equal financial stability that is approved by the County's Purchasing Agent.
- 9.03 **Insurance Coverage Requirements:** Without limiting CONTRACTOR's duty to

indemnify, CONTRACTOR shall maintain in effect throughout the term of this Agreement a policy or policies of insurance with the following minimum limits of liability:

Commercial General Liability Insurance: including but not limited to premises and operations, including coverage for Bodily Injury and Property Damage, Personal Injury, Contractual Liability, Broad form Property Damage, Independent Contractors, Products and Completed Operations, with a combined single limit for Bodily Injury and Property Damage of not less than \$1,000,000 per occurrence, and \$2,000,000 in the aggregate.

(Note: any proposed modifications to these general liability insurance requirements shall be attached as an Exhibit hereto, and the section(s) above that are proposed as not applicable shall be lined out in blue ink. All proposed modifications are subject to County approval.)

Auto Liability Coverage: must include motor vehicles, including scheduled, non-owned, and hired vehicles, used in providing services under this Agreement, with a combined single limit or Bodily Injury and Property Damage of not less than \$1,000,000 per occurrence.

(Note: any proposed modifications to these auto insurance requirements shall be attached as an Exhibit hereto, and the section(s) above that are proposed as not applicable shall be lined out in blue ink. All proposed modifications are subject to County approval.)

Workers' Compensation Insurance: if CONTRACTOR employs others in the performance of this Agreement, in accordance with California Labor Code section 3700 and with Employer's Liability limits not less than \$1,000,000 each person, \$1,000,000 each accident and \$1,000,000 each disease.

(Note: any proposed modifications to these workers' compensation insurance requirements shall be attached as an Exhibit hereto, and the section(s) above that are proposed as not applicable shall be lined out in blue ink. All proposed modifications are subject to County approval.)

Professional Liability Insurance: if required for the professional services being provided, (e.g., those persons authorized by a license to engage in a business or profession regulated by the California Business and Professions Code), in the amount of not less than \$1,000,000 per claim and \$2,000,000 in the aggregate, to cover liability for malpractice or errors or omissions made in the course of rendering professional services. If professional liability insurance is written on a "claims-made" basis rather than an occurrence basis, the CONTRACTOR shall, upon the expiration or earlier termination of this Agreement, obtain extended reporting coverage ("tail coverage") with the same liability limits. Any such tail coverage shall continue for at least three years following the expiration or earlier termination of this Agreement.

(Note: Professional liability insurance coverage is required if the contractor is providing a professional service regulated by the state. Examples of service providers regulated by the state are insurance agents, professional architects and engineers, doctors, certified public accountants, lawyers, etc. However, other professional Contractors, such as computer or software designers, technology services, and services providers such as claims administrators, should also have professional liability. If in doubt, consult with your risk or contract manager.)

If the contractor maintains broader coverage and/or higher limits than the minimums shown above, the County requires and shall be entitled to the broader coverage and/or higher limits maintained by the contractor.

9.04 Other Requirements:

All insurance required by this Agreement shall be with a company acceptable to the County and issued and executed by an admitted insurer authorized to transact Insurance business in the State of California. Unless otherwise specified by this Agreement, all such insurance shall be written on an occurrence basis, or, if the policy is not written on an occurrence basis, such policy with the coverage required herein shall continue in effect for a period of three years following the date CONTRACTOR completes its performance of services under this Agreement.

Each liability policy shall provide that the County shall be given notice in writing at least thirty days in advance of any endorsed reduction in coverage or limit, cancellation, or intended non-renewal thereof. Each policy shall provide coverage for Contractor and additional insureds with respect to claims arising from each subcontractor, if any, performing work under this Agreement, or be accompanied by a certificate of insurance from each subcontractor showing each subcontractor has identical insurance coverage to the above requirements.

Additional Insured Status:

The County of Monterey, its officers, officials, employees, agents, and volunteers are to be covered as additional insureds on the auto liability policy for liability arising out of automobiles owned, leased, hired or borrowed by or on behalf of the Contractor. Auto liability coverage shall be provided in the form of an endorsement to the CONTRACTOR'S insurance.

The County of Monterey, its officers, officials, employees, agents, and volunteers are to be covered as additional insureds on the commercial general liability policy with respect to liability arising out of work or operations performed by or on behalf of the CONTRACTOR including materials, parts, or equipment furnished in connection with such work or operations. General liability coverage shall be provided in the form of an endorsement to the CONTRACTOR'S insurance (at least as broad as ISO Form CG 20 10 11 85 or if not available, through the addition of both CG 20 10, CG 20 26, CG 20 33, or CG 20 38; and CG 20 37 if a later edition is used).

Primary Coverage:

For any claims related to this contract, the CONTRACTOR'S insurance coverage shall be primary and non-contributory and at least as broad as ISO CG 20 01 04 13 as respects the County, its officers, officials, employees, agents, and volunteers. Any insurance or self-insurance maintained by the County, its officers, officials, employees, agents, or volunteers shall be excess of the CONTRACTOR'S insurance and shall not contribute with it. This requirement shall also apply to any Excess or Umbrella liability policies.

Workers' Compensation Waiver of Subrogation:

The workers' compensation policy required hereunder shall be endorsed to state that the workers' compensation carrier waives its right of subrogation against COUNTY, its officers, officials, employees, agents, or volunteers, which might arise by reason of payment under such policy in connection with performance under this Agreement by CONTRACTOR. Should CONTRACTOR be self-insured for workers' compensation, CONTRACTOR hereby agrees to waive its right of subrogation against COUNTY, its officers, officials,

employees, agents, or volunteers.

Prior to the execution of this Agreement by the County, CONTRACTOR shall file certificates of insurance and endorsements with the County's contract administrator and County's Contracts/Purchasing Division, showing that the CONTRACTOR has in effect the insurance required by this Agreement. The CONTRACTOR shall file a new or amended certificate of insurance within five calendar days after any change is made in any insurance policy, which would alter the information on the certificate then on file. Acceptance or approval of insurance shall in no way modify or change the indemnification clause in this Agreement, which shall continue in full force and effect. CONTRACTOR shall always during the term of this Agreement maintain in force the insurance coverage required under this Agreement and shall send, without demand by County, annual certificates to County's Contract Administrator and County's Contracts/Purchasing Division. If the certificate is not received by the expiration date, County shall notify CONTRACTOR and CONTRACTOR shall have five calendar days to send in the certificate, evidencing no lapse in coverage during the interim. Failure by CONTRACTOR to maintain such insurance is a default of this Agreement, which entitles County, at its sole discretion, to terminate this Agreement immediately.

10.0 RECORDS AND CONFIDENTIALITY:

- 10.01 **Confidentiality:** CONTRACTOR and its officers, employees, agents, and subcontractors shall comply with any and all federal, state, and local laws, which provide for the confidentiality of records and other information. CONTRACTOR shall not disclose any confidential records or other confidential information received from the County or prepared in connection with the performance of this Agreement, unless County specifically permits CONTRACTOR to disclose such records or information. CONTRACTOR shall promptly transmit to County any and all requests for disclosure of any such confidential records or information. CONTRACTOR shall not use any confidential information gained by CONTRACTOR in the performance of this Agreement except for the sole purpose of carrying out CONTRACTOR's obligations under this Agreement.
- 10.02 **County Records:** When this Agreement expires or terminates, CONTRACTOR shall return to County any County records which CONTRACTOR used or received from County to perform services under this Agreement.
- 10.03 **Maintenance of Records:** CONTRACTOR shall prepare, maintain, and preserve all reports and records that may be required by federal, state, and County rules and regulations related to services performed under this Agreement. CONTRACTOR shall maintain such records for a period of at least three years after receipt of final payment under this Agreement. If any litigation, claim, negotiation, audit exception, or other action relating to this Agreement is pending at the end of the three-year period, then CONTRACTOR shall retain said records until such action is resolved.
- 10.04 **Access to and Audit of Records:** The County shall have the right to examine, monitor and audit all records, documents, conditions, and activities of the CONTRACTOR and its subcontractors related to services provided under this Agreement. Pursuant to Government Code section 8546.7, if this Agreement involves the expenditure of public funds in excess of \$10,000, the parties to this Agreement may be subject, at the request of the County or as part of any audit of the County, to the examination and audit of the State Auditor pertaining

to matters connected with the performance of this Agreement for a period of three years after final payment under the Agreement.

10.05 **Royalties and Inventions:** County shall have a royalty-free, exclusive and irrevocable license to reproduce, publish, and use, and authorize others to do so, all original computer programs, writings, sound recordings, pictorial reproductions, drawings, and other works of similar nature produced in the course of or under this Agreement. CONTRACTOR shall not publish any such material without the prior written approval of County.

10.06 **Format of Deliverables:** For this section, "Deliverables" shall mean all electronic documents CONTRACTOR provides to the County under this Agreement. CONTRACTOR shall ensure all Deliverables comply with the requirements of the Web Content Accessibility Guidelines ("WCAG") 2.1, pursuant to the Americans with Disabilities Act ("ADA"). CONTRACTOR bears the burden to deliver Deliverables, such as Adobe Acrobat Portable Document Format ("PDF") and Microsoft Office files, complying with WCAG 2.1. CONTRACTOR shall defend and indemnify the County against any breach of this Section. This Section shall survive the termination of this Agreement. Find more on Accessibility at this State website: <https://webstandards.ca.gov/accessibility/>.

11.0 **NON-DISCRIMINATION:**

11.01 During the performance of this Agreement, CONTRACTOR, and its subcontractors, shall not unlawfully discriminate against any person because of race, religious creed, color, sex, national origin, ancestry, physical disability, mental disability, medical condition, marital status, age (over 40), sexual orientation, or any other characteristic set forth in California Government code § 12940(a), either in CONTRACTOR's employment practices or in the furnishing of services to recipients. CONTRACTOR shall ensure that the evaluation and treatment of its employees and applicants for employment and all persons receiving and requesting services are free of such discrimination. CONTRACTOR and any subcontractor shall, in the performance of this Agreement, fully comply with all federal, state, and local laws and regulations which prohibit discrimination. The provision of services primarily or exclusively to such target population as may be designated in this Agreement shall not be deemed to be prohibited discrimination.

12.0 **COMPLIANCE WITH TERMS OF STATE OR FEDERAL GRANTS:**

If this Agreement has been or will be funded with monies received by the County pursuant to a contract with the state or federal government in which the County is the grantee, CONTRACTOR will comply with all the provisions of said contract, to the extent applicable to CONTRACTOR as a subgrantee under said contract, and said provisions shall be deemed a part of this Agreement, as though fully set forth herein. Upon request, County will deliver a copy of said contract to CONTRACTOR, at no cost to CONTRACTOR.

13.0 **COMPLIANCE WITH APPLICABLE LAWS:**

13.01 CONTRACTOR shall keep itself informed of and in compliance with all federal, state, and local laws, ordinances, regulations, and orders, including but not limited to all state and federal tax laws that may affect in any manner the Project or the performance of the Services or those engaged to perform Services under this AGREEMENT as well as any privacy laws including, if applicable, HIPAA. CONTRACTOR shall procure all permits and licenses,

pay all charges and fees, and give all notices require by law in the performance of the Services.

- 13.02 CONTRACTOR shall report immediately to County’s Contracts/Purchasing Officer, in writing, any discrepancy or inconsistency it discovers in the laws, ordinances, regulations, orders, and/or guidelines in relation to the Project of the performance of the Services.
- 13.03 All documentation prepared by CONTRACTOR shall provide for a completed project that conforms to all applicable codes, rules, regulations, and guidelines that are in force at the time such documentation is prepared.

14.0 INDEPENDENT CONTRACTOR:

In the performance of work, duties, and obligations under this Agreement, CONTRACTOR is always acting and performing as an independent contractor and not as an employee of the County. No offer or obligation of permanent employment with the County or County department or agency is intended in any manner, and CONTRACTOR shall not become entitled by virtue of this Agreement to receive from County any form of employee benefits including but not limited to sick leave, vacation, retirement benefits, workers’ compensation coverage, insurance or disability benefits. CONTRACTOR shall be solely liable for and obligated to pay directly all applicable taxes, including federal and state income taxes and social security, arising out of CONTRACTOR’s performance of this Agreement. In connection therewith, CONTRACTOR shall defend, indemnify, and hold County harmless from any and all liability which County may incur because of CONTRACTOR’s failure to pay such taxes.

15.0 NOTICES:

Notices required under this Agreement shall be delivered personally or by first-class, postage pre-paid mail to the County and CONTRACTOR’S contract administrators at the addresses listed below:

FOR COUNTY:	FOR CONTRACTOR:
Patty Small, Management Analyst II	Matthew Dawe, Vice President
Name and Title	Name and Title
1441 Schilling Pl., South 2nd Fl., Salinas, CA 93901	400 Continental Blvd., El Segundo, CA 90245
Address	Address
831-784-5929 / smallp@countyofmonterey.gov	519-859-0454 / mdawe@psdcitywide.com
Phone:	Phone:

16.0 MISCELLANEOUS PROVISIONS.

- 16.01 **Conflict of Interest:** CONTRACTOR represents that it presently has no interest and agrees not to acquire any interest during the term of this Agreement, which would directly, or indirectly conflict in any manner or to any degree with the full and complete performance

of the services required to be rendered under this Agreement.

- 16.02 **Amendment:** This Agreement may be amended or modified only by an instrument in writing signed by the County and the CONTRACTOR.
- 16.03 **Waiver:** Any waiver of any terms and conditions of this Agreement must be in writing and signed by the County and the CONTRACTOR. A waiver of any of the terms and conditions of this Agreement shall not be construed as a waiver of any other terms or conditions in this Agreement.
- 16.04 **Contractor:** The term “CONTRACTOR” as used in this Agreement includes CONTRACTOR’s officers, agents, and employees acting on CONTRACTOR’s behalf in the performance of this Agreement.
- 16.05 **Disputes:** CONTRACTOR shall continue to perform under this Agreement during any dispute.
- 16.06 ~~**Assignment and Subcontracting:** The CONTRACTOR shall not assign, sell, or otherwise transfer its interest or obligations in this Agreement without the prior written consent of the County. None of the services covered by this Agreement shall be subcontracted without the prior written approval of the County. Notwithstanding any such subcontract, CONTRACTOR shall continue to be liable for the performance of all requirements of this Agreement.~~
- 16.07 **Successors and Assigns:** This Agreement and the rights, privileges, duties, and obligations of the County and CONTRACTOR under this Agreement, to the extent assignable or delegable, shall be binding upon and inure to the benefit of the parties and their respective successors, permitted assigns, and heirs.
- 16.08 **Headings:** The headings are for convenience only and shall not be used to interpret the terms of this Agreement.
- 16.09 **Time is of the Essence:** Time is of the essence in each and all of the provisions of this Agreement.
- 16.10 **Governing Law:** This Agreement shall be governed by and interpreted under the laws of the State of California; venue shall be Monterey County.
- 16.11 **Non-exclusive Agreement:** This Agreement is non-exclusive and both County and CONTRACTOR expressly reserve the right to contract with other entities for the same or similar services.
- 16.12 **Construction of Agreement:** The County and CONTRACTOR agree that each party has fully participated in the review and revision of this Agreement and that any rule of construction to the effect that ambiguities are to be resolved against the drafting party shall not apply in the interpretation of this Agreement or any amendment to this Agreement.
- 16.13 **Counterparts:** This Agreement may be executed in two or more counterparts, each of which shall be deemed an original, but all of which together shall constitute one and the same Agreement.

16.14 **Authority:** Any individual executing this Agreement on behalf of the County or the CONTRACTOR represents and warrants hereby that he or she has the requisite authority to enter into this Agreement on behalf of such party and bind the party to the terms and conditions of this Agreement.

16.15 **Integration:** This Agreement, including the exhibits, represent the entire Agreement between the County and the CONTRACTOR with respect to the subject matter of this Agreement and shall supersede all prior negotiations, representations, or agreements, either written or oral, between the County and the CONTRACTOR as of the effective date of this Agreement, which is the date that the County signs the Agreement.

16.16 **Interpretation of Conflicting Provisions:** In the event of any conflict or inconsistency between the provisions of this Agreement and the Provisions of any exhibit or other attachment to this Agreement, the provisions of this Agreement shall prevail and control.

17.0 **CONSENT TO USE OF ELECTRONIC SIGNATURES.**

17.01 The parties to this Agreement consent to the use of electronic signatures via DocuSign to execute this Agreement. The parties understand and agree that the legality of electronic signatures is governed by state and federal law, 15 U.S.C. Section 7001 et seq.; California Government Code Section 16.5; and, California Civil Code Section 1633.1 *et. seq.* Pursuant to said state and federal law as may be amended from time to time, the parties to this Agreement hereby authenticate and execute this Agreement, and any and all Exhibits to this Agreement, with their respective electronic signatures, including any and all scanned signatures in portable document format (PDF).

17.02 **Counterparts.**

The parties to this Agreement understand and agree that this Agreement can be executed in two (2) or more counterparts and transmitted electronically via facsimile transmission or by delivery of a scanned counterpart in portable document format (PDF) via email transmittal.

17.03 **Form: Delivery by E-Mail or Facsimile.**

Executed counterparts of this Agreement may be delivered by facsimile transmission or by delivery of a scanned counterpart in portable document format (PDF) by e-mail transmittal, in either case with delivery confirmed. On such confirmed delivery, the signatures in the facsimile or PDF data file shall be deemed to have the same force and effect as if the manually signed counterpart or counterparts had been delivered to the other party in person.

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18.0 SIGNATURE PAGE

IN WITNESS WHEREOF, County and CONTRACTOR have executed this Agreement as of the day and year written below.

COUNTY OF MONTEREY

CONTRACTOR

PSD Citywide (US) Inc.

Contractor/Business Name *

Signed by:

Matthew Dawe,

(Signature of Chair, President, or Vice-President)

Matthew Dawe, Vice President

Name and Title

9/22/2025 | 10:20 AM PDT

By:

Contracts/Purchasing Officer

Date:

By:

Department Head (if applicable)

Date:

Approved as to Form
Office of the County Counsel¹
Susan K. Blich, County Counsel

Signed by:

Mary Grace Perry

Deputy County Counsel

Date:

9/25/2025 | 3:06 PM PDT

Approved as to Fiscal Provisions

Signed by:

Patricia Ruiz

Auditor/Controller

By:

Date:

9/25/2025 | 4:10 PM PDT

Reviewed as to Liability Provisions
Office of the County Counsel-Risk Management

Signed by:

David Bolton

David Bolton, Risk Manager

By:

Date:

9/22/2025 | 11:46 AM PDT

By:

Date:

By:

Date:

(Signature of Secretary, Asst. Secretary, CFO, Treasurer, or Asst. Treasurer)

Thomas Dawe, Secretary

Name and Title

9/22/2025 | 10:27 AM PDT

County Board of Supervisors' Agreement No. _____ approved on _____

*INSTRUCTIONS: If CONTRACTOR is a corporation, including non-profit corporations, the full legal name of the corporation shall be set forth above together with the signatures of two (2) specified officers (California Corporations Code, §313). If CONTRACTOR is a Limited Liability Corporation (LLC), the full legal name of the LLC shall be set forth above together with the signatures of either 1) any member, or 2) two (2) managers (Corporations Code, §17703.01, subds. (a) and (d)). If CONTRACTOR is a partnership, the full legal name of the partnership shall be set forth above together with the signature of a partner who has authority to execute on behalf of the partnership (Corporations Code, §§16301 and 15904.02). If CONTRACTOR is contracting in an individual capacity, the individual shall set forth the name of the business, if any, and shall personally sign

¹ Approval by the Office of the County Counsel is required.

² Approval by Auditor-Controller is required.

³ Review by Risk Management is necessary only if changes are made in the Indemnification or Insurance paragraphs.

EXHIBIT A

**To Agreement by and between
County of Monterey, hereinafter referred to as “County”
AND
PSD Citywide (US) Inc., hereinafter referred to as “CONTRACTOR”**

Scope of Services / Payment Provisions

I. SCOPE OF SERVICES

The following Scope of Services is provided by CONTRACTOR for the County’s Public Work’s Division of the Public Works, Facilities and Parks Department. The County may request the same services for the Facilities Division and/or Parks Division under this Agreement at a later date for a separate fee to be negotiated for implementation and annual support and maintenance.

CONTRACTOR shall provide services and staff, and otherwise do all things necessary for or incidental to the performance of work, as set forth below:

A. Phase 1: ASSETS MODULE (CITYWIDE ASSETS) IMPLEMENTATION. *At the end of Phase 1, CONTRACTOR’s deliverable to County is a completed asset registry and GIS layers (based on County-provided data) for the Public Works Division of the Public Works and Facilities Department that includes Roads, Traffic and Transportation; Bridges; and, Storm Water Asset Classes, ready for use in Phase 2 Maintenance Module setup.* Timeline for this phase is *approximately four months*. This phase consists of Citywide Assets Implementation which includes Asset Register set up, ESRI ArcGIS integration, GIS Viewer, decision support module, and data conversion. CONTRACTOR’s Work Plan shall outline project meetings, testing, training, configuration and planning required for Phase 1 of this project in order to ensure all project details and updates are being communicated.

CONTRACTOR shall provide the County with a comprehensive Asset Implementation Work Plan which shall include project initiation and planning, data gathering, configuration and analysis.

1. **Assets Module – Initiation and Planning Task.** CONTRACTOR shall provide project initiation and planning services which include the following:

1.1. **Documentation Creation and Kick-off Preparation Task.**

Project Documentation Creation and Kick-off Preparation services to ensure clear understanding of the scope of work which shall include the following:

- Development of materials focused on project vision/direction, objectives/outcomes, anticipated benefits and proposed timelines in advance of the Phase 1 kick-off meeting.

Exhibit A – Scope of Services/Payment Provisions
PSD Citywide (US) Inc.

CMMS Software and Implementation (RFP #10936)
Public Works, Facilities and Parks

- Project Manager generating a project register, tentative project plan and completing any additional project documentation required for this Phase 1 of this project.

1.2. **Kick-off Meeting Task.** CONTRACTOR's assigned Project Manager shall hold and facilitate a formal project initiation virtual meeting with key CONTRACTOR and County stakeholders which shall accomplish the following:

- Establish points of contact.
- Build initial consensus on project approach.
- Assign responsibilities.
- Ensure all initiating tasks are complete before work begins.
- CONTRACTOR's core team members being available to answer County's questions and explain aspects of proposed implementation approach in more granular detail.

1.3. **Plan Development Task.** CONTRACTOR's Project Manager shall work with County stakeholders to finalize a tailored Project Plan documenting the following:

- All identified project goals and objectives, roles and responsibilities of project stakeholders, project risks and methods of risk mitigation.
- Finalized Phase 1 Project Schedule displaying assigned tasks, milestones and due dates in Gantt chart format that County staff has access to online for actively monitoring project progress in real-time.
- Consideration of all resourcing and scheduling constraints of County and CONTRACTOR to ensure a realistic and achievable plan is developed.

During Plan Development Task, other key documents, including but not limited to Data Migration Plan and Preliminary Training Plan can also be developed, based on the needs and capacity of the County.

1.4. **Task Completion: Project Initiation and Planning Task** shall be considered completed upon County's acceptance of the final Phase 1 Project Plan.

2. **Data Gathering Task.**

2.1. **County Data Collection Task.**

County shall be responsible for compiling all asset data County wishes to migrate to the new system. These data sources may include, but are not limited to, Accounting Fixed Asset Registers, Access or Excel files, etc.

2.2. **CONTRACTOR Data Collection Support Task.** Tasks shall include the following:

Exhibit A – Scope of Services/Payment Provisions
PSD Citywide (US) Inc.

CMMS Software and Implementation (RFP #10936)

- CONTRACTOR shall advise County on data collection best practices.
- CONTRACTOR shall have representatives available to provide support and answer questions throughout the Data Gathering process.

2.3. Data Entry and Template Development Task. Tasks shall include the following:

- CONTRACTOR shall populate data upload templates, using data gathered and delivered by County, which will be used to migrate large quantities of information into **Citywide Assets**.
- CONTRACTOR shall ensure that County can easily verify that the correct information is being collected and uploaded.

2.4. Data Gap Analysis Task.

CONTRACTOR shall review populated templates for consistency and completeness and identify any gaps in the current dataset.

2.4.1. Data Review Meeting Task.

CONTRACTOR shall schedule and facilitate meeting with appropriate County staff to review the results of the initial gap analysis, including any inconsistencies CONTRACTOR has found with the data, additional data that County needs to provide to CONTRACTOR to move forward on the project, areas County should focus efforts to eliminate any critical data gaps, and advise County on best practices for filling in identified gaps.

2.4.2. Task Completion:

Data Gathering Task shall be considered complete when all data has been gathered and analyzed, and once CONTRACTOR's team has received all applicable data in a format that can be uploaded into the system.

3. Configuration and Analysis Task.

CONTRACTOR shall provide configuration and analysis services which include the following:

3.1. Data Formatting and Upload Task.

CONTRACTOR shall upload all County data into **Citywide Assets**, conduct a thorough analysis of data within the system, and determine if any additional fields that are necessary for system use.

3.2. Client Profile Review Task.

CONTRACTOR shall provide to County a summary of all uploaded asset inventory/reporting data via County's preference of either (1) an export to excel, or (2) access to County's database based on County's proficiency with Assets for County's

review, and work with County to implement any final recommendations or make any required adjustments.

3.3. Activate GIS Viewer and Decision Support Task.

CONTRACTOR shall facilitate discussions with applicable County staff to gather information needed for CONTRACTOR-hosted spatial data repository, integration, and implementation of automatic integration between County's solutions and third-party systems. This integration is performed remotely.

3.3.1. Analysis of GIS Data Task.

CONTRACTOR shall deliver templates to County for use in collecting GIS Data for analysis and assess the quantity and quality of data.

3.3.2. Configuration of Integration Task.

CONTRACTOR shall provide all support services needed to achieve automatic integration of **Citywide Assets** with County's ArcGIS and make any needed modifications necessary to load CONTRACTOR's system directly to related asset(s).

3.3.3. GIS Go Live Task.

CONTRACTOR shall ensure that County has full access to the new data in **Citywide Assets** and access to GIS capabilities for all unique asset categories, and then CONTRACTOR's project manager shall send confirmation that this "GIS Go Live" stage has been completed.

3.4. Decision Support and Decision Support Training Task.

CONTRACTOR shall enable the license for **Citywide Decision Support (DS)** and provide walkthrough training of the Decision Support interface, features and navigation.

3.5. Single Sign-On (SSO) Integration Task.

CONTRACTOR shall provide Single Sign-On (SSO) Integration services which include the following:

3.5.1. Initial Meeting and Information Gathering with County's IT staff/representative(s) on Authentication Implementation Task.

CONTRACTOR's Developer shall facilitate meet with County's IT staff/representative(s) to gather information regarding County's Identity Provider, including how County implements authentication, type of Identity Provider County uses, protocol to be used to establish a connection between CONTRACTOR's **Citywide Assets** and County's Identity Provider, gather any additional information needed to complete the SSO configuration, determine required parameters, and, if needed, hold follow-up meeting(s) to discuss further requirements.

- 3.5.2. **Establish Connection Task.** CONTRACTOR shall, working with County’s IT staff, do all things necessary to establish all required connections, allow County to test connection in sandbox test environment, including facilitating working sessions with County’s test users to trouble shoot issues and roadblocks during configuration, and complete Go-Live, deploying the connection so that County users can log into **Citywide Assets** with their Identity Provider, disable the sandbox environment once Go-Live is successful, and proceed with County using it as a test database moving forward.
- 3.5.3. **Single Sign-on (SSO) Connection Task.** CONTRACTOR’s developer shall be available throughout the duration of County’s testing of SSO connection to provide support to County and resolve any issues that arise.
- 3.5.4. **Connection Deployed Task.** CONTRACTOR shall, upon determining that the connection is working properly, complete Go-Live, move the connection to the County’s **Citywide** production database, and disable the sandbox environment enabling County to continue using it as a test database moving forward.
- 3.5.5. **Task Completion: Configuration and Analysis Task** shall be considered completed when County signs off on Data, Assets, GIS Viewer, Decision Support and Single Sign-On are active and configured.
4. **Administrator Training Task.** CONTRACTOR shall provide hosted training workshops, using a “Train the Trainer” model, with County’s subject matter experts and Administrators and/or “Power” users, and if County choses additional users, on all functions and applications of **Citywide Assets**, including GIS Viewer and SSO Integrations utilizing a demo database that replicates County’s **Citywide** database, with trainings ensuring County’s proficient use of core functionality and flow of **Citywide Assets**, GIS viewer, SSO and mobile applications, and including creating users, setting permissions and notifications, reporting, updating asset information and management of assets and asset data within the system.
- 4.1. **Task Completion: Administrator Training Task** shall be considered completed when County users are comfortable with core system functionality.
5. **User Acceptance Testing Task.** CONTRACTOR shall conduct testing execution with County staff.
- 5.1. **Task Completion: User Acceptance Testing Task** shall be considered complete when County has signed off on User Acceptance Testing.
6. **Go Live Task.** CONTRACTOR shall provide the following services for the Go Live Task:
- Facilitate “one-click” Go-Live with applicable County staff, providing comprehensive Go-Live support during this process, correcting any system configuration, system integration and/or data migration deficiencies discovered at no

additional cost to County, ensuring County's smooth transition to use of **Citywide Assets** and add-ons.

- Post-implementation support for County.
- Prepare Final Phase 1 – **Citywide Assets** Close-out Report covering key implementation findings that includes, but is not limited to, overview of key events and activities, significant variations, lessons learned and recommendations for future steps County can take to expand use of the application.
- Facilitate Phase 1 – **Citywide Assets** Close-out Meeting for review of the Phase 1 **Citywide Assets** Close-out Report with applicable County staff and stakeholders.

6.1. **Task Completion: Go Live Task** is considered complete once **Citywide Assets** is fully implemented, County has full access and has signed off on final acceptance of the **Citywide Assets** module.

B. PHASE 2: MAINTENANCE MODULE (CITYWIDE MAINTENANCE) IMPLEMENTATION WORK PLAN. *At the end of Phase 2, CONTRACTOR's deliverable to County is the completed implementation of fully operational Citywide Enterprise Asset Management (EAM) Software consisting of Citywide Assets Module (asset management solution and asset registry) and Citywide Maintenance Module (Computerized Maintenance Management System (CMMS)), including Citywide Mobile, third party integrations, GIS Viewer, Decision Support and Route Patrol (Route Patrol licensing included, but not implementation) sub-modules, access to CONTRACTOR's API Library, Customer Portal implementation, County staff trained on full use of the system, and County transitioned to PSD Citywide Support for the Public Works Division of the Public Works, Facilities and Parks Department.* Timeline for this phase is *approximately six months*. This phase consists of **Citywide Maintenance** Implementation which includes third party integrations, Route Patrol and Customer Portal. CONTRACTOR's work plan shall outline project meetings, testing, training, configuration and planning required for this project in order to ensure all project details and updates are being communicated.

CONTRACTOR shall provide the County with a comprehensive Maintenance Implementation Work Plan which shall include project initiation and planning, County's maintenance and operations management requirements, review of acquisition templates and proposed Project Work Plan.

1. **Maintenance Module (Citywide Maintenance) Initiation and Planning Task.** CONTRACTOR shall provide the following Phase 2 Maintenance Module Implementation project initiation and planning services which include the following:

1.1. **Introduction Call, Kickoff Meeting and Project Workplan Task.** CONTRACTOR shall provide the following Introduction Call, Kickoff Meeting and Project Workplan services:

Exhibit A – Scope of Services/Payment Provisions
PSD Citywide (US) Inc.

CMMS Software and Implementation (RFP #10936)

- CONTRACTOR's assigned Project Manager shall gather more information to begin the detailed Phase 2 Maintenance (Citywide Maintenance) Project Plan.
- CONTRACTOR's assigned Project Manager shall facilitate Kick-off Meeting with applicable County staff to determine County's maintenance and operations management requirements to incorporate into the system, and review acquisition templates and proposed Project Work Plan.
- CONTRACTOR shall finalize Project Work Plan.

1.2. **Task Completion:** Maintenance Module (Citywide Maintenance) Initiation and Planning Task shall be considered complete when the Project Work Plan is finalized and approved by County.

2. **Data Gathering, Analysis, Formatting and Configuration Task.** CONTRACTOR shall provide the following Data Gathering, Analysis, Formatting and Configuration services:

- Prepare and finalize System Configuration/Data Acquisition Templates for County's use in collecting datasets from which CONTRACTOR shall upload data sets into the **Maintenance Module**. Templates shall be similar to the example in Exhibit B – PSD Citywide's Proposal in Response to RFP #10936 at Page 34 at Section 2.1.
- Provide support and work with County throughout this datasets collection and configuration process, and any data not yet available can be entered into the **Citywide Maintenance** system by County later.
- Facilitate a Template Review Meeting with County staff to review results of initial data gathering, including any inconsistencies discovered and/or additional data needed, and suggest methods to correct inconsistencies and/or obtain outstanding data needed.
- Configure and upload collected data and information into **Citywide Maintenance** and format the data within the system.

2.1. **Task Completion: Data Gathering, Analysis, Formatting and Configuration Task** shall be considered complete when County's completed templates are delivered to CONTRACTOR and CONTRACTOR has uploaded the data into **Citywide Maintenance**.

3. **Maintenance Configuration Task.** CONTRACTOR shall work with the County to prepare and deliver a user acceptance testing (UAT) plan, that's tested, has applicable functionality, and is acceptable with the County, and ensure that maintenance configurations are tested and refined for County's needs and County's satisfaction, including adjusting and finalization of

Maintenance processes, configurations and user profiles. CONTRACTOR shall provide the following Maintenance Configuration Task services:

3.1. Prepare and Deliver Testing Plan Task. Prepare and Deliver Testing Plan services that consist of the following:

- Developing a user acceptance testing (UAT) plan to validate that key business requirements are met by the system.
- In conjunction with CONTRACTOR, County shall agree to the testing criteria/plan which will be used to ensure users can perform the items listed and prepare for closing the configuration milestone.
- Working with County staff to finalize applicable functionality that will be tested based on the defined scope of work.

3.2. Test and Refine Maintenance Configurations Task. CONTRACTOR shall provide the following Test and Refine Maintenance Configurations services (after client-supplied data has been formatted within Maintenance to be in-line with County's specifications) that consists of the following:

- Working with County staff to develop and test specific scenarios in the system.
- Providing, as needed, supplemental training and tutorials to County users.

3.3. Works Processes, Configurations and User Profiles Finalized Task. CONTRACTOR shall adjust and finalize maintenance processes, configurations and user profiles, working alongside County staff to complete any refinements and/or modifications to enable transition to user acceptance testing.

3.4. Task Completion: Maintenance Configuration Task shall be considered complete when configuration of **Citywide Maintenance** has been completed.

4. Administrator User Training and Process Workshops Task. CONTRACTOR shall provide the following User Training and Process Workshop Task services:

4.1. Process Workshop Task. Process Workshop Task services including the following:

- Review of existing processes at the County and/or in current systems.
- Recommendations to better enable County to use the application's available functionality.

- Implementation specialists facilitating working session(s) which include the following:
 - Working with County staff to set up workflow scenarios in the system to give the County a better understanding of the software.
 - Gaining a better sense of the County's processes to allow CONTRACTOR to build scenarios into Citywide.
 - An Analysis of end user training requirements.
- Project Manager, upon conclusion of working session(s), developing and delivering a summary document detailing significant events and circumstances that impacted the process analysis and workshop.

4.2. Administrator User Training Task. Administrative User Training Task services including the following:

- Facilitating user training sessions for County staff who serve as administrators of the system, including IT personnel and analysts, as determined by the County.
- Facilitating user training sessions for County maintenance administrative staff as determined by County to provide County users/administrators with a deep understanding of key operations and maintenance management functionality, with the training including a session devoted to service requests, work orders and maintenance and operations management functionality including, but not limited to the following:
 - How to use the administrative section.
 - How to issue work orders/services requests/preventative maintenance events.
 - Resource costing.
 - How to utilize reporting functionality.
 - How to access information for support.

4.3. Task Completion: Administrator User Training and Process Workshops Task shall be considered completed when County's key users are trained and comfortable with the System.

5. Third Party Integrations with Citywide Maintenance Task. CONTRACTOR shall provide Third Party Integrations with Citywide Maintenance Task services that include the following:

Exhibit A – Scope of Services/Payment Provisions
PSD Citywide (US) Inc.

CMMS Software and Implementation (RFP #10936)

- Meet with County stakeholders to define clear objectives and expected outcomes for each integration, and document existing systems and data flows.
- Develop an integration blueprint and select appropriate integration tools and/or platforms.
- Testing the integration and ensuring it works correctly and as intended before **Citywide Maintenance** is taken out of the testing sandbox.
- Implementing “Go-Live,” with the integration being transitioned to full production use while closely monitoring and a support team being available to provide support.

5.1. **Task Completion: Third Party Integrations with Citywide Maintenance Task** shall be considered complete when all integrations are completed, and County has signed off on this task.

6. **Route Patrol Implementation.** CONTRACTOR shall provide Route Patrol module as part of licensing fee(s). Implementation is not included at this time; however, the County may request implementation at a later date under this contract, for a separate fee to be negotiated.
7. **User Acceptance Testing Task.** CONTRACTOR shall, while the Maintenance Database is in a test environment, work with County staff to follow a rigorous testing routine to test and refine system configurations, with CONTRACTOR’s Maintenance Implementation Team being available to provide support and additional training, if needed.

7.1. **Task Completion: User Acceptance Testing Task** shall be considered completed when the testing has been completed, and County has signed off.

8. **Supplemental Administrator Training Task.** CONTRACTOR shall, in addition to previous trainings on basic system functionality, provide Supplemental Administrator Training services on advanced functionality that may include Citywide Core Administration (users, roles and permissions), scheduled and preventative maintenance activities, creating and managing inspections, parts and materials management, resource costing (workers and equipment) and customer and properties management.

8.1. **Task Completion: Supplemental Administrator Training Task** shall be considered completed when System Administrators are trained in advanced functionality of the system.

9. **End User Training and Go-Live Task.** Milestone accomplished when County achieves Go-Live. CONTRACTOR shall provide the following End User Training and Go-Live services:

- Schedule and facilitate role-based user training sessions to ensure the County's end users are comfortable with the system and able to access all information and documentation required to fully use **Citywide Maintenance**.
- Perform configuration transfer.
- Conduct County's transition to Go-Live.

9.1. **Task Completion: End User Training and Go-Live Task** is considered complete upon County's successful Go-Live.

10. **Go-Live Support Task.** CONTRACTOR shall provide the following Go-Live Support services:

- Project Manager to lead Go-Live activities and provide support to County throughout the Go-Live process.
- Project Manager and Maintenance Implementation Team shall be available for questions and assistance during go-live processes and immediately following go-live to support corporate transition to full use of Maintenance and Active Support.
- CONTRACTOR's support team shall provide additional check-in support at the 30, 60 and 90-day marks post implementation.
- CONTRACTOR's teams shall correct all deficiencies discovered during the go-live processes related to system configuration, system integration and/or data migration.
- CONTRACTOR's teams shall, prior to transitioning County to Citywide Support, provide further testing and tutorials as County needs to ensure County's staff has sufficient level of comfort as they begin full use of the new system.

10.1. **Task Completion: Go-Live Support Task** is considered completed when County has support during the Go-Live process and through County's successful transition to Active Support.

11. **Project Closure Task.** CONTRACTOR shall provide the following Project Closure Task services:

- Facilitate a Project Closure and Transition to Support Meeting that includes presentation of key findings to County stakeholders and project owner which will mark the transition to ongoing Citywide Support via CONTRACTOR's Support Center.

- Project Manager shall compile key findings from the **Citywide Maintenance** implementation and include them in a final project close-out report and briefing which shall include an overview of the following:
 - Key events and activities.
 - Significant variations.
 - Lessons learned.
 - Recommendations for future steps that County may take to expand the use of the new application.

11.1.Task Completion: The Project Closure Task shall be considered completed when County's implementation is fully completed, and County has successfully transitioned to PSD Citywide Support.

II. PAYMENT PROVISIONS

A. COMPENSATION/ PAYMENT

Pricing and Fees Summary

County shall pay an amount not to exceed \$1,000,000, for the performance of all things necessary for or incidental to the performance of work as set forth in the Scope of Services, provided the expenditures per fiscal year do not exceed \$200,000. CONTRACTOR's compensation for services rendered shall be based on the following rates or in accordance with the following terms:

Year 1 Initial Implementation Services	\$ 86,400
Year 1 Initial Software - Annual Version Protection & Maintenance (Up to 125 Licenses, Maintenance, Upgrades)	\$ 78,500
Year 1 Contingency (Through June 30, 2026)	\$ 35,100
Year 2 Software and Added Services NTE (July 1, 2026 – June 30, 2027)	\$ 200,000
Year 3 Software and Added Services NTE (July 1, 2027 – June 30, 2028)	\$ 200,000
Year 4 Software and Added Services NTE (July 1, 2028 – June 30, 2029)	\$ 200,000
Year 5 Software and Added Services NTE (July 1, 2029 – June 30, 2030)	\$ 200,000
Total Contract Amount	\$1,000,000

Pricing and Fees Detail

Phase 1 - Assets and Decision Support Module Fee Breakdown

Implementation Services Payable based on the percentage of completion of each milestone outlined in the Scope of Services as reflected in CONTRACTOR's project management tool Kantata. Total Implementation Services fees are as follows:

<u>Phase 1 – Citywide Assets Module</u> Implementation Professional Services		Amount
Project Management	Needs Assessment, Kickoff Meeting, Project Planning, Schedules, Status Reports, Update Meetings, Issues and Go-Live Planning	\$ 1,800.00
Total Project Management		\$ 1,800.00
Implementation & Configuration	Data Review & Formatting	\$ 5,400.00
Database Hierarchy Configuration		
User Defined Attributes Configuration		
Data Import		
Configure Users, Roles & Permissions		
Total Implementation & Configuration		\$ 5,400.00
Training	Admin Training	\$ 900.00
Admin Decision Support Training		\$ 1,800.00
End User Training		\$ 900.00
Total Training		\$ 3,600.00
<u>Phase 1 – Citywide Assets Module</u> Implementation Professional Services		\$10,800.00
TOTAL IMPLEMENTATION COSTS		

Phase 2 - Maintenance Module Project Budget Fee Breakdown

<u>Phase 2 – Citywide Maintenance Module</u>		Amount
Implementation and Professional Services		
Project Management	Needs Assessment, Kickoff Meeting, Project Planning, Schedules, Status Reports, Update Meetings, Issues and Go-Live Planning	\$ 3,600.00
Total Project Management		\$ 3,600.00
Implementation and Configuration	Service Requests	\$30,600.00
Work Orders		
Workflow Process Control		
Customers and Properties		
Preventative & Scheduled Maintenance [up to 100]		
Workflow Notifications		
Testing – AT, System, Test Cases/Scenarios		
Go-Live Support		
Total Implementation and Configuration		\$30,600.00
Training	Division Admin Training	\$ 5,400.00
Core Sys Maintenance Admin Training		\$ 5,400.00
End User and Mobile Training		\$ 3,600.00
Total Training		\$14,400.00
<u>Phase 2 – Citywide Maintenance Module</u>		\$48,600.00
TOTAL IMPLEMENTATION and PROFESSIONAL SERVICES IMPLEMENTATION COSTS		

Software - Annual Version Protection and Maintenance (Up to 125 Licenses, Maintenance, Upgrades)

Item	Amount
Citywide Assets + Maintenance	\$62,000.00
Value Added Annual Version Protection and Maintenance	\$16,500.00
TOTAL SOFTWARE - ANNUAL VERSION PROTECTION AND MAINTENANCE	\$78,500.00

Annual Version Protection and Maintenance (Up to 125 Licenses, Maintenance, Upgrades) to be invoiced 90 days following the Phase 1 Kick-off Meeting, with each subsequent year to be invoiced annually from that date. Annual Version Protection and Maintenance is limited to a maximum annual escalation of five percent (5%) per year. Annual Version Protection and Maintenance includes all new version and

upgrades of Citywide Software free of charge as well a service packs issued promptly to fix problems reported by customers and deliver minor functionality and performance improvements.

Value Added Features and Services Breakdown

Value Added Features and Services	In Scope	Implementation	Annual Fee
Citywide Core			
GIS Integration (WMS) - Automatic (PW Assets)	✓	\$ 3,600.00	Included
Field Mapper Setup and Configuration [ArcGIS Customization]	✓	\$ 5,400.00	Included
Single Sign-on (SSO) Integration (PW Team only)	✓	\$ 1,800.00	\$ 1,500.00
StreetSaver (Initial Data Sync, and CSV Sync Training)	✓	Included	Included
WinCams Integration – Labor (Setup and Documentation)	✓	\$ 3,600.00	\$ 4,000.00
30/60/90 Day Reviews	Included	Included	Included
Assets Module			
Citywide Asset Collector (PW License only)	✓	Included	\$ 1,000.00
Asset Profiles (Up to 5) – Configure Current Processes for Condition, Risk, Lifecycle to drive Capital Planning needs.	✓	\$ 3,600.00	N/A
Image File Upload (PW Assets)	✓	\$ 1,800.00	N/A
Maintenance Module			
Citywide Customer Portal	✓	\$ 3,600.00	\$10,000.00
Legacy Data Import – Bulk Files & Attachments	✓	\$ 3,600.00	N/A
TOTALS		\$27,000.00	\$16,500.00

Master Rate Schedule:

Master Rate Schedule		
Team Member	Labor Category	Amount
Christie Wiggers	Lead Project Manager, Director of Implementation	\$225.00
Sarah Stewart	Software Implementation Advisor	\$225.00
Richard Konietzny	Implementation Advisor	\$225.00
Peter Scott	CTO, Technical Advisor	\$250.00
Anita Frost	Account Manager	N/A

Consulting Rates:

- \$1,800 per day (8 hours of services).
- \$225 per hour.

County and CONTRACTOR agree that CONTRACTOR shall be reimbursed for travel expenses during this Agreement. CONTRACTOR shall receive compensation for travel expenses as per the “County Travel Policy”. A copy of the policy is available online at <https://www.co.monterey.ca.us/home/showdocument?id=69364> To receive reimbursement, CONTRACTOR must provide a detailed breakdown of authorized expenses, identifying what was expended and when.

County and CONTRACTOR agree that CONTRACTOR and its subcontractors shall be reimbursed for mileage based upon the Internal Revenue Service (IRS) standard business mileage rate at the time of travel.

The County may elect to reallocate funding from one category or task to another based on actual expenditure needs, providing the total expenditure amount does not exceed the agreement amount.

B. CONTRACTORS BILLING PROCEDURES

Payment shall be based upon satisfactory acceptance of each deliverable or portion of deliverable.

CONTRACTOR SHALL verify project invoices to ensure proper accounting of project charges.

Invoices under this Agreement shall be submitted monthly and promptly, and in accordance with Paragraph 6.0, “Payment Conditions”, of the Agreement. All invoices shall reference the Multi-Year Agreement (MYA) number, services and associated Delivery Order number, and an original hardcopy shall be sent to the following address or via email to PWFP-Finance-AP@countyofmonterey.gov:

Exhibit A – Scope of Services/Payment Provisions
PSD Citywide (US) Inc.

CMMS Software and Implementation (RFP #10936)

County of Monterey
Department of Public Works, Facilities and Parks (PWFP) – Finance Division
1441 Schilling Place, South 2nd Floor
Salinas, California 93901-4527

Any questions pertaining to invoices under this Agreement shall be directed to the PWFP Finance Division at (831) 755-4800 or by emailing to: PWFP-Finance-AP@countyofmonterey.gov.

County may, in its sole discretion, terminate the Agreement or withhold payments claimed by CONTRACTOR for services rendered if CONTRACTOR fails to satisfactorily comply with any term or condition of this Agreement.

No payments in advance or in anticipation of services or supplies to be provided under this Agreement shall be made by County.

County shall not pay any claims for payment for services submitted more than twelve (12) months after the calendar month in which the services were completed.

DISALLOWED COSTS: CONTRACTOR is responsible for any audit exceptions or disallowed costs incurred by its own organization or that of its subcontractors.

EXHIBIT B

**TO AGREEMENT BY AND BETWEEN
COUNTY OF MONTEREY, HEREINAFTER REFERRED TO AS “COUNTY”
AND
PSD CITYWIDE (US) INC., HEREINAFTER REFERRED TO AS “CONTRACTOR”
ASSIGNMENT AND SUBCONTRACTING**

Section 16.06 Assignment and Subcontracting is replaced with the following:

Assignment and Subcontracting: The CONTRACTOR shall not assign, sell, or otherwise transfer its interest or obligations in this Agreement without the prior written consent of the County. Such consent to not be unreasonably withheld. None of the services covered by this Agreement shall be subcontracted without the prior written approval of the County. Notwithstanding any such subcontract, CONTRACTOR shall continue to be liable for the performance of all requirements of this Agreement.

Exhibit C

PSD Citywide Proposal in Response to RFP #10936



Proposal Response

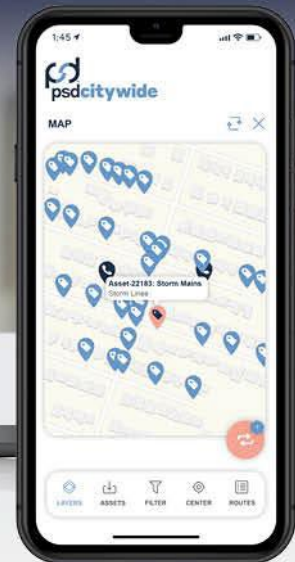
COMPUTERIZED MAINTENANCE MANAGEMENT SYSTEM (CMMS) SOFTWARE AND IMPLEMENTATION SERVICES

RFP #10936

County of Monterey, CA

PSD Citywide Contact: Anita Frost
400 Continental Blvd.
El Segundo, California, 90245
e: afrost@psdCitywide.com
p: 619-565-9374

Select	Asset ID	Asset Category	Asset Segment	Sub-Function	Description	Historical Cost	Closing Cost	Probability of Failure	Consequence of Failure
☐	05102	Buildings	Fixed Tower Building	No Sub-Function	Radio Tower	\$1,500.00	\$1,500.00	1 - Rare	1 - Insignificant
☐	05102	Buildings	Fixed Tower Building	No Sub-Function	Radio Tower	\$7,000.00	\$7,000.00	1 - Rare	1 - Insignificant
☐	30031	Buildings	Fixed Tower Building	No Sub-Function	Radio Tower	\$30,000.00	\$30,000.00	1 - Rare	2 - Minor
☐	30030	Buildings	Fixed Tower Building	No Sub-Function	Electricity Block	\$25,000.00	\$25,000.00	1 - Rare	1 - Insignificant
☐	30030	Buildings	Fixed Tower Building	No Sub-Function	Water Unit	\$100,000.00	\$100,000.00	1 - Rare	4 - Major
☐	30048	Machinery & Equipment	Fire	3410 - Fire		\$6,812.84	\$6,812.84	2 - Unlikely	1 - Insignificant
☐	30047	Machinery & Equipment	Fire	3410 - Fire		\$13,625.67	\$13,625.67	2 - Unlikely	1 - Insignificant
☐	30046	Machinery & Equipment	Fire	3410 - Fire		\$20,738.49	\$20,738.49	2 - Unlikely	1 - Insignificant
☐	30045	Roads	Collector - Road	No Sub-Function	Road Base	\$200,000.00	\$200,000.00	1 - Rare	3 - Moderate
☐	30044	Roads	Surface	3011 - Roads - Paved	Road Surface	\$100,000.00	\$100,000.00	2 - Unlikely	3 - Moderate
☐	30043	Land	Right of Way	No Sub-Function	Irregular	\$13,804.00	\$13,804.00	1 - Rare	3 - Moderate
☐	30042	Land	Right of Way	No Sub-Function		\$12,945.00	\$12,945.00	1 - Rare	3 - Moderate
☐	30041	Land	General Government	Plant 002-Lux 010		\$1,000.00	\$1,000.00	0 - Data	1 - Insignificant
☐	30040	Land	General Government	Plant 002-Lux 001		\$427.00	\$427.00	1 - Rare	1 - Insignificant
☐	30039	Sanitary System	Sanitary Lines	No Sub-Function		\$5,127.00	\$5,127.00	1 - Unlikely	2 - Minor
☐	30038	Sanitary System	Sanitary Lines	No Sub-Function		\$3,219.00	\$3,219.00	1 - Rare	2 - Minor
☐	30037	Sanitary System	Sanitary Lines	No Sub-Function		\$2,489.00	\$2,489.00	1 - Rare	2 - Minor
☐	30036	Sanitary System	Sanitary Lines	No Sub-Function		\$3,308.00	\$3,308.00	1 - Rare	2 - Minor
☐	30035	Sanitary System	Sanitary Lines	No Sub-Function		\$5,034.00	\$5,034.00	1 - Rare	2 - Minor
☐	30034	Storm System	Catch Basin	No Sub-Function	Single Catch Basin	\$512.00	\$512.00	3 - Possible	1 - Insignificant
☐	30033	Storm System	Catch Basin	No Sub-Function	Double Catch Basin	\$1,024.00	\$1,024.00	2 - Unlikely	1 - Insignificant
☐	30032	Storm System	Catch Basin	No Sub-Function	Single Catch Basin	\$1,536.00	\$1,536.00	1 - Possible	1 - Insignificant



COMPUTERIZED MAINTENANCE MANAGEMENT SYSTEM (CMMS) SOFTWARE
AND IMPLEMENTATION SERVICES



RFP #10936

Cover Letter

On behalf of PSD Citywide (US) Inc., I am pleased to submit to the County of Monterey (herein known as the "County") our response to the **Computerized Maintenance Management System (CMMS) Software and Implementation Services** RFP. We have read and understood the requirements of this RFP and endeavored to ensure that this proposal is complete, accurate and representative of our ability to provide the County with comprehensive asset management services.

PSD Citywide is a corporation founded in 2003. At the moment PSD has no plans on merging with other companies or dissolving and has not been part of any litigation within the past 5 years.

On behalf of PSD Citywide, thank you for the opportunity to provide our proposal, and we look forward to discussing our services and capacity with you in greater detail. PSD Citywide's authorized agent, designated to discuss and possibly negotiate elements contained within the response is Anita Frost, Account Manager afrost@psdcitywide.com p: (619) 565- 9374 a: 400 Continental Blvd. El Segundo, California, 90245.

Anita Frost – Account Manager

PSD Citywide (US) Inc.

ATTACHMENT E: SIGNATURE PAGE

COUNTY OF MONTEREY
DEPARTMENT OF PUBLIC WORKS, FACILITIES and
PARKS

RFP #10936
ISSUE DATE May 23, 2024



RFP TITLE: COMPUTERIZED MAINTENANCE MANAGEMENT SYSTEM AND IMPLEMENTATION

PROPOSALS OR QUALIFICATIONS PACKAGES ARE DUE IN THE
DEPARTMENT OF PUBLIC WORKS, FACILITIES AND PARKS BY
3:00 P.M., LOCAL TIME, ON JUNE 28, 2024

If the package is to be delivered by carrier, the carrier tracking number shall be provided to the Primary Contact for the County listed in Section 4.1 of this solicitation. If the package is delivered in person, a confirmation of receipt shall be requested by the CONTRACTOR or by the CONTRACTOR's representative or agent.

MAILING ADDRESS:

COUNTY OF MONTEREY
DEPARTMENT OF PUBLIC WORKS,
FACILITIES AND PARKS
1441 SCHILLING PLACE, SOUTH 2nd FLOOR
SALINAS, CALIFORNIA 93901-4527

**QUESTIONS ABOUT THIS RFQ SHOULD BE SUBMITTED IN WRITING
VIA EMAIL** and directed to the County's **Primary Contact Patty Small**
Email: SmallP@countyofmonterey.gov

CONTRACTOR MUST INCLUDE THE FOLLOWING IN EACH PROPOSAL OR QUALIFICATIONS PACKAGES (one [1] original plus three [3] copies):

☐ ALL REQUIRED CONTENT AS DEFINED PER SECTION 8.1 HEREIN

This Signature Page must be included with your submittal in order to validate your proposal or qualifications package.
Proposal or qualifications packages submitted without this page will be deemed non-responsive.

☐ **CHECK HERE IF YOU HAVE ANY EXCEPTIONS TO THIS SOLICITATION.**

CONTRACTOR MUST COMPLETE THE FOLLOWING TO VALIDATE PROPOSAL

I hereby agree to furnish the articles and/or services stipulated in my proposal or qualifications package at the price quoted, subject to the instructions and conditions in the RFQ. I further attest that I am an official officer representing my firm and authorized with signatory authority to present this proposal or qualifications package.

Company Name: PSD Citywide (US) Inc. _____ Date: 07/17/24 _____

Signature: _____ Printed Name: Anita Frost _____

Street Address: 400 Continental Blvd. _____

City: El Segundo _____ State: CA _____ Zip: 90245 _____

Phone: (619) 565-9374 _____ Fax: (_____) N/A _____

Email: afrost@psdcitywide.com _____

License No. (If applicable): _____ License Classification (If applicable): _____

- This acknowledgement signature page of Addendum No. 1 must be submitted with your proposal/qualifications package.
- If this acknowledgement signature page is not submitted with your proposal/qualifications package, your entire proposal/qualifications package may be considered non-responsive.

RECEIPT IS HEREBY ACKNOWLEDGED OF ADDENDUM No. 1, RFP #10936

Authorized Company Signature

PSD Citywide (US) Inc.

Company Name

Anita Frost

Printed Name

07/17/24

Date

~ END ADDENDUM No. 1 ~

MONTEREY COUNTY

PUBLIC WORKS, FACILITIES & PARKS



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Randell Ishii, MS, PE, TE, PTOE, Director
1441 Schilling Place, South 2nd Floor
Salinas, California 93901-4527

Date: Tuesday, July 2, 2024

To: All Contractors Submitting Proposal/Qualification Packages for Request For Proposal (RFP) #10936 COMPUTERIZED MAINTENANCE MANAGEMENT SYSTEM (CMMS) SOFTWARE AND IMPLEMENTATION SERVICES FOR THE DEPARTMENT OF PUBLIC WORKS, FACILITIES AND PARKS

From: Patty Small, Management Analyst II

Subject: Addendum No. 2

This addendum consists of **PRELIMINARY QUESTIONS/WRITTEN RESPONSES AND UPDATED ADDITIONAL REQUIREMENTS** for **RFQ #10936 COMPUTERIZED MAINTENANCE MANAGEMENT SYSTEM (CMMS) SOFTWARE AND IMPLEMENTATION SERVICES FOR THE DEPARTMENT OF PUBLIC WORKS, FACILITIES AND PARKS.**

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RECEIPT IS HEREBY ACKNOWLEDGED OF ADDENDUM No. 2, RFP #10936

Authorized Company Signature

PSD Citywide (US) Inc.

Company Name

Anita Frost
Printed Name

07/17/24
Date

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Executive Summary

PSD Citywide is a privately held firm incorporated in both Canada and the United States with a local office in Los Angeles, CA. Founded in 2003 as “The Public Sector Digest,” and rebranded as “PSD” in 2017, PSD Citywide has produced a wide range of publications, reports, and resources covering topics such as governance, sustainability, financial management, and technology in the public sector.

PSD Citywide works closely with over 600 geographically and demographically diverse governments, regions, agencies, utilities, universities, and indigenous communities from all over North America as our software clients.

In addition to the Citywide Software suite, we offer asset management advisory services. Through our interdisciplinary advisory team PSD has developed and

delivered over 400 asset management plans and over 150 asset management programs, helping clients build sustainable and strategic practices that encompass all asset classes.

Our team of over 130 employees is composed of experienced engineers, accountants, technical specialists, analysts, former senior municipal managers, GIS and operations specialists, and software developers. To ensure client programs adhere to leading standards, our advisors and analysts are certified through the Institute of Asset Management (IAM) and are well-versed in industry best practices including ISO 55000. PSD will not be using the services of subcontractors for this project.



Related Publications

In January 2024, PSD released an article with APWA on Delivering Affordable Levels of Service which outlines how California governments can produce a sustainable financial strategy.

<https://apwa.partica.online/reporter/january-2024/features/delivering-affordable-levels-of-service>

In 2023, PSD developed and released an E-Book for APWA titled “Asset Management is more than Maintenance” providing local governments with best practices on asset management.

<https://www.apwa.org/insights-and-solutions/asset-management-is-more-than-maintenance/>

In 2018 PSD developed a national report that was completed in partnership with the Canadian Water Network and the Canadian Water and Wastewater Association. The report titled, “Leveraging Asset Management Data for Improved Water Infrastructure Planning” is a national study of municipal asset management practices to identify and assess what data is being collected by Canadian utilities on water, wastewater, and stormwater assets, and how this information is being used to inform operations and long-term planning decisions. <https://cwn-rce.ca/report/leveraging-asset-management-data-for-improved-water-infrastructure-planning/>

Product Description

To achieve the County's objectives, we propose supplying and implementing our **Citywide Enterprise Asset Management (EAM) Software**. Citywide is a true enterprise solution as all modules within the Citywide Platform integrate with each other and were designed in a singular platform to work with one another to create a central repository of information. Both asset and maintenance management capabilities are provided with our single Citywide Platform through two core modules: **Citywide Maintenance** and **Citywide Assets**. Within these two modules, PSD will include the GIS Viewer, Decision Support and Route Patrol sub-modules as part of this solution. PSD will also include access to our API library for additional integrations.

The proposed modules of our Enterprise Asset Management solution include:

Citywide Maintenance

Citywide Maintenance is a comprehensive Computerized Maintenance Management System (CMMS) with built-in work order, preventative maintenance, and service request applications. This solution is designed to enable departments to prioritize, schedule, and track maintenance projects and access and manage work orders and service requests from within the office or while out in the field.

This solution has also been designed from the ground up to facilitate workflow management, project management, and resource calculation. At its core, Citywide Maintenance would support the County's need to plan, manage, assign, record, and report on all manner of work completed as part of its daily operations.

Within this module, the County can plan and carry out preventive maintenance tasks and inspections. Staff can track resources and produce cost reports. The **mobile app** offers purpose-built functionality to staff in the field whether they are completing maintenance activities or completing inspections and assessing asset condition.

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Key Features and Benefits



Service Requests and Work Orders

Track service requests, generate and assign work orders.



Resource Calculation

Track parts, materials, equipment, and hours related to work orders.



Accurate and Data-Rich Reporting

Make informed decisions with built-in reports.



Maintenance Schedules

Add maintenance schedules triggered by time and asset usage.



Mobile Functionality

View and edit work orders in the field in real time.



Project Tracking

Track progress and budget for capital or infrastructure projects.



Inspections and Compliance Monitoring

Classify and customize work orders to track compliance inspections.



Full GIS Capabilities

View all available information related to components on the map.



Workflow Process Control

Customize workflows based on your SOPs.



Email Notifications

Notifications about key activities and work order status.



Customer Portal

Embed an online portal in your website for service requests.



API

Application Programming Interface to integrate with other software.

For additional information and screenshots on Citywide Maintenance, please see – [Appendix II: Citywide Maintenance](#)

Citywide Route Patrol

Citywide Route Patrol is a sub-module enhancement offered within Citywide Maintenance enabling municipalities to schedule, record and track road patrols conducted by staff using the Citywide Mobile App. Users can assess the compliance status of road assets for patrolling requirements in the built-in asset inventory, locate deficiencies, and visualize the patrols and compliance requirements on the GIS Viewer. Ultimately, the software facilitates the real-time response action to resolve recorded deficiencies within set time frames.

Citywide Route Patrol can complete road and winter patrols efficiently and accurately by creating and scheduling optimized patrol routes, marking deficiencies with a mobile device.

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Key Features and Benefits

- **Create optimized patrol routes:** Allows users to flag the planned route as a road or trail patrol route.
- **Complete patrol:** Automatically manage routine patrols of road or trail assets, marking deficiencies for compliance with maintenance standards as you go.
- **Limit corporate risk:** Limit risk with automated road or trail patrols and detailed reporting.
- **Save time:** Capturing data in the field rather than duplicating entries when Wi-Fi is present saves time.

With Citywide Route Patrol, users can:

1. Track Patrol history via mobile map
2. Locate deficiencies
3. View Patrol history on a map
4. Review and resolve deficiencies via work orders
5. Run deficiency reports
6. Record weather and condition updates
7. Use Built-in maintenance standard requirements
8. Run asset patrol history reports
9. Collect required deficiency details and attach photos during patrols
10. Take advantage of Planned vs actual route mapping
11. Validate underlying assets of patrols
12. Use Asset level compliance indicators with last valid patrol date
13. View the Asset Patrol Compliance Map
14. Define custom maintenance compliance criteria and deficiency resolution times.

For additional information and screenshots on Citywide Route Patrol, please see – [Appendix II: Citywide Route Patrol](#)

Citywide Assets

Citywide Assets is our enterprise asset management solution and asset register that supports all asset classes. Designed to align with industry standards and incorporate core asset management functions, Citywide Assets serves as one central database for all assets, providing users with a single corporate-wide source for asset information. Users can attach photos and other documents to their assets to maintain additional records or information within Citywide.

More than just an asset register, Citywide Assets powers accurate and efficient financial reporting, along with sophisticated asset management functions, including lifecycle planning, risk scoring and management, levels of service, and decision optimization.

With Citywide Assets, users can design their own asset data hierarchy using built-in industry standards for naming classifications (for example, Uniformat coding). Users can also create asset profiles for similar asset types to easily generate detailed lifecycle strategies, risk matrices, and condition reports within the application.

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Key Features and Benefits



Attributes

Develop unlimited asset attributes to create multiple scenarios.



Risk Modeling

Unlimited risk classes, metrics, and weightings.



Lifecycle Planning

Create lifecycle strategies, and financial, capital, operating plans.



Reporting

Create and save reports to share across the organization.



GIS and Mapping

Integrate with GIS to see assets, condition, and risk, directly from the map.



Asset Collector

Field staff can download and visualize assets in the field.

For additional information and screenshots on Citywide Assets, please see – [Appendix II: Citywide Assets](#)

Citywide Decision Support

Citywide Decision Support is an add-on enhancement to Citywide Assets and works with all data within the Citywide suite. Using your assets along with their condition, risk and lifecycle data, Decision Support creates multiple scenarios so you can optimize and communicate your infrastructure projects.

Citywide Decision Support allows organizations to create and define various levels of service scenarios from different asset intervention strategies, taking into consideration risk, performance, and lifecycle event information. Citywide Decision Support allows for the generation of unlimited scenarios, comparing up to four simultaneous scenarios on actual available budget dollars. Because of the use of risk, performance and lifecycle information, users will be able to forecast budgets using accurate asset information and data driven decision making, leading to long-term savings on your overall asset maintenance program.

Key Features of Citywide Decision Support



Automatically Test & Compare Scenarios

Automatically test and compare possible scenarios for asset event strategies – providing users with the most optimal outcome. When creating scenarios, customized weightings (i.e., 40% risk, 60% performance) are used to prioritize the most impactful measurements for your community.



Track Assets

Use the maps feature to plot assets enabling you to track grouped assets based on performance, risk, and budget. The map gives a bird's eye view of grouped assets and their performance, and the changes that occur over different time periods.

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Plan More Effectively

Project levels of service – including condition and risk – to better plan infrastructure projects.



Easily Communicate Data

Quickly and accurately produce dynamic graphs and tables to assist with communicating decision points to council, senior management and the public. Users can easily toggle between different graphs/ outputs to communicate scenarios to your audience as clearly as possible.

Develop Multiple Scenarios for Real-Time Comparison

Decision Support allows users to optimize infrastructure decision-making and planning with available data. Users can project optimal funding requirements, compare lifecycle event scenarios, view asset performance and risk, and create unlimited infrastructure asset management scenarios.

Users can compare up to four simultaneous scenarios at once, and a comprehensive understanding of the impacts of the assessed scenarios on actual available budget dollars, leading to long-term savings on your overall asset management program.

To enhance the client's asset management programming, the following functionality is also included in the asset lifecycle strategies within Decision Support:

- Ongoing maintenance activities and costs
- Renewal/ replacement activities, service thresholds and costs
- Rehabilitation activities, service thresholds and cost
- Disposal activities and cost

For additional information on Citywide Decision Support, please see [Appendix II – Citywide Decision Support](#)

Citywide GIS Viewer

Citywide software comes out of the box with native integration to ESRI ArcGIS web and features services. All GIS data is available in our dedicated Citywide GIS module.

The GIS module uses asset data and allows information such as material types, dimensions, traffic counts and any other relevant information, to be displayed on assets within the map. Key design principles include an intuitive interface with high visual impact, to produce demonstrable maps while maintaining the required internal functionality that an organization needs. The module is integrated with all other Citywide modules and allows for viewing of asset location through the Assets database. The GIS module also facilitates the use of GIS information by all departments that have access to Citywide. All asset information that resides in the database such as condition, risk, and any other attribute information, can also be displayed in the GIS system. This functionality allows users to use this information to identify trends and patterns as their data is displayed in a visual way. Asset values maintained in ESRI can be automatically synced in the Citywide Assets module and reflected against each Asset's attributes by simply using our (no-coding required) field mapping tool.

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Automatic Integration

Citywide has an OGC compliant GIS Viewer that can connect to existing WMS/WFS services from any compliant service. By identifying a common ID between the assets in GIS and our system, our solution can pass standard HTTP GET arguments to load our viewer with them. Our application can be modified to take such arguments (i.e., a link generated from a feature in the GIS system) to load our system directly to the related asset.

For additional information on Citywide GIS Viewer, please see [Appendix II – Citywide GIS Viewer](#)

Single Sign-On (SSO)

A technology that allows a user to log in to a variety of related but independent software systems with a single user ID and password. With SSO, a user only needs to enter one set of login credentials one time on a single page to access all their authorized applications.

Citywide software applications support SSO through Identity Providers such as Active Directory, Active Directory Federation Service, Azure Active Directory, or Keycloak. We have found that the use of Identity Providers is the best way to efficiently support SSO for other applications out of the box, thereby simplifying system access and user experience for Citywide users. PSD Citywide supports SSO via OAuth2, OIDC or SAML authentication protocols.

Citywide Mobile

Citywide's mobile functionality is a dedicated mobile app for both Android and iOS systems. The application is designed to keep running even if internet connectivity is lost; once the connection is re-established, it will automatically synchronize any changes made while offline.

The Citywide mobile app allows clients to access work order or service request information in the field, locate it by map, and assist with the daily operations of any department. The app allows the user to complete and track inspection work orders against each individual asset including the condition of the asset as part of each inspection. Users can also update calendars, complete priority work, review, and complete pending tasks.

For additional information on Citywide Mobile, please see [Appendix II – Citywide Mobile](#)

Additional Citywide Integrations

PSD will integrate with the County's requested third-party solutions using our API library.

Citywide API

Citywide API will support the County in establishing integrations with the key systems outlined within the RFP such as Outer Spatial, Street Saver, eCMS, WinCAMs, MC uConnect, Oracle Fusion Cloud HCM, and potential future integrations such as 2NForm. Integrations can also be handled using built-in excel based import/export functionality and this approach can support data syncing where a third-party system does not offer an API or data does not need to be synced on a regular basis.

Citywide software is extremely versatile thanks to the Citywide API library. The library contains out-of-the-box API documentation that allows authorized sources to extract data, automate tasks, or integrate with third-party systems. The County can utilize these prebuilt API keys to integrate with additional

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systems if desired in the future. Citywide's external API is a RESTful web service that can be accessed by bearers of a valid API key. Arguments are provided as GET (query) and POST parameters and data is formatted as JSON. Citywide's external API is accessed via the HTTPS protocol, implementing standard URL structuring and HTTP verbs to allow data to be retrieved or written. Attempts made over HTTP will be met with a 301 redirect status code. Requests are made to a specific URL/endpoint relating to the resource being interacted with, plus related parameters.

All API requests must have the following 3 query parameters:

- 1) **client_db**: a string containing your short-form client name (used during login) and schema (database instance) code* separated by a period, eg. cityname.main
- 2) **username**: a string containing the name of the user related to the api_key parameter.
- 3) **api_key**: the API key related to the user accessing the resource.

For the County to complete integrations with their current systems, PSD Citywide will enable the Citywide API within their Citywide system.

County staff can log in to their system to access the API and find downloadable test and example code packages used to verify connectivity to Citywide's external API and perform sample requests to the API's endpoints.

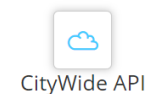
Test and Example Code Packages

Below you can find downloadable code packages which can be used to verify connectivity to CityWide's external API, and perform sample requests to the API's endpoints. You will need to fill in your API key and related details to utilize the package.

Basic Package

A HTML/JavaScript package that uses AJAX requests to demonstrate access to API resources. Includes example GET, PUT, and PATCH requests.

[Click to Download Package](#)



Downloads > api_basic_examples > api_basic_examples	
Name	Type
config	JavaScript File
examples	Chrome HTML Document
jquery-3.3.1.min	JavaScript File
README	Text Document
script	JavaScript File
style	Cascading Style Sheet Document

PSD Citywide's Systems Integration Methodology

PSD Citywide has successfully completed hundreds of integrations with our municipal clients. Throughout the entire integration process, communication is key. PSD Citywide will regularly update all stakeholders on progress and involve them in decision-making. PSD Citywide is only responsible for creating the API routes that expose data within Citywide. Typically, a middleware is required to enable APIs from various systems. If the County does not currently use a middleware, PSD Citywide can recommend some common systems used for APIs. Finally, post-implementation, we will continue to monitor and optimize the integration to ensure it continues to effectively meet business requirements.

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PSD Citywide's Systems Integration Methodology is outlined below.

Step	Purpose	Best Practices
Step 1: Requirements Gathering (Discovery)	Understand the goals and needs of the integration.	- Engage stakeholders from different departments. - Define clear objectives and expected outcomes. - Document existing systems and data flows.
Step 2: Solution Design	Create a blueprint for the integration.	- Select appropriate integration tools or platforms. - Design data mappings and transformation logic. - Leverage existing API routes found in the Citywide API library and/or modify/create additional API routes to meet requirements. - Ensure scalability and security.
Step 3: Testing (Initial Phase)	Ensure the integration works correctly.	- Develop comprehensive test cases. - Conduct unit testing for individual components. - Perform integration testing to validate data flow. - Implement user acceptance testing (UAT) with real users. - Automate testing where possible to save time and reduce errors.
Step 4: Documentation	Create a reference for the integration.	- Document integration workflows, configurations, and data mappings. - Maintain clear, up-to-date documentation. - Provide training materials for users and support teams.
Step 5: Implementation	Deploy the integration in a controlled environment.	- Use a staging or development environment for initial deployment. - Follow a change management process to notify affected teams. - Monitor system performance during deployment.
Step 6: Testing (Final Phase)	Verify the integration in the production environment.	- Conduct final testing in the production environment. - Ensure data accuracy and consistency. - Validate that the integration meets performance expectations.
Step 7: Go-Live	Transition to full production use.	- Communicate the go-live date to all stakeholders. - Monitor the integration closely during the initial days. - Have a support team ready to address immediate issues. - Maintain communication channels for feedback and reporting.
Step 8: Client Acceptance and Sign-Off	Confirm that the integration meets expectations.	- Engage with users to gather feedback. - Address any post-go-live issues promptly. - Obtain formal acceptance or sign-off from the client or stakeholders. - Celebrate the successful completion of the integration project.

Reporting Capabilities

Customizing reports in Citywide is an intuitive process, designed to meet the diverse needs of our users. The system offers a robust report repository, which can be customized to allow users to select various parameters and view data in multiple ways. Whether users need to focus on specific asset details, maintenance schedules, or performance metrics, our system enables clients to tailor reports by considering most data fields available within the platform.

Users can easily choose from a range of filters and display options to create reports that align with their specific requirements. Once configured, these customized reports can be saved for future use, ensuring quick access and consistent reporting standards. This flexibility enhances the user experience and empowers organizations to gain deeper insights and make data-driven decisions with ease.

Citywide Maintenance Default Reports

Default reports allow users to display data in a variety of formats, such as graphs, data views and dashboards. All reports are exportable to .csv.

Citywide Maintenance Default Reports	
Service Request	Reports on Service Request types by department. Users can filter on additional information such as responsible person, status, priority, etc.
Work Order	Reports on the Work Order type by asset. Users can filter on additional information such as worker, department, status, priority, etc.
Inspection	Reports on Inspection Work Orders. Users can filter on specific asset, status, department, priority, etc.
Timesheet	Reports on Labor Time based on start and end dates displaying wage type and employee ID if applicable. Users can filter by worker.
Labor Details	Reports on wage types, hours, worker, etc. and GL Codes if applicable.
Parts/Materials Details	Reports on cost for parts and materials including GL Codes if applicable.
Equipment Details	Reports on cost for equipment including GL Codes if applicable.
Cost Entries Details	Reports on all cost transactions including labor, equipment, and parts and materials.
Exception	Reports on mismatched and/or duplicate data.
Overdue Work Orders	Reports on the Work Orders with an overdue status based on target dates. Users can filter on status, worker, priority, etc.
Downtime	Reports on asset downtime transaction recorded on a work order or directly on the asset record in Assets
Variance	Reports on Work Order budget variance if using Work Order budgets.
Certifications	Reports on issued or expired certifications during the selected time period. Users can filter by department, vendor, etc.
First In First Out (FIFO) and Last In First Out (LIFO)	Reports on parts and materials currently in stock.

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Projects	Reports on project related Work Orders and budget status.
Minimum Maintenance Standards (MMS)	Reports on Route Patrol deficiencies, asset patrols, and asset compliance.
Wage Trend	Reports on wage values per employee/staff position.
Attribute	Reports on Work Order or Service Request available attributes and attribute field types (for example, drop-down, text, date, number, etc.)

Citywide Assets Default Reports

Default reports allow users to display data in a variety of formats, such as graphs, data views and dashboards. All reports are exportable to .csv.

Default Asset Management Reports	
Annual Requirement	Provides a summary of the annual \$ requirement needed to maintain infrastructure. Can include Lifecycle events in this report.
Replacement Profile	Identifies Capital cost projections year-after-year or increments such as every 5 years. Useful when considering short, medium, and long-term Capital cost projections. This report will also identify assets that are backlogged (i.e., assets that are still in use but have reached the end of their stated useful life).
Capital Replacement Profile	This report is the same as the Replacement Profile report but filtered for Capital.
Operating Replacement Profile	This report is the same as the Replacement Profile report but filtered for Operating.
Growth Replacement Profile	This report is the same as the Replacement Profile report but filtered for Growth.
Coordinated IDs Report	Reports on assets that are group together using a Co-ordinated ID.
Lifecycle Deficiency / Facility Condition Index (FCI)	Report provides a summary on which of the activities (lifecycle events in the asset profiles that have been applied to assets) are completed at the asset level.
Lifecycle Deficiency / FCI Event List	Report provides a summary on which of the activities (lifecycle events in the asset profiles that have been applied to assets) are completed at the asset level.
Lifecycle Deficiency / FCI Matrix	Report provides a matrix on which of the activities (lifecycle events in the asset profiles that have been applied to assets) are completed at the asset level.
Projected Lifecycle Deficiency / FCI	Report provides a summary on which of the activities (lifecycle events in the asset profiles that have been applied to assets) are completed at the asset level.
Attribute Report	This report allows for analysis of data based on Attributes (i.e., material type, pipe diameter, etc.).
Installation Profile	Reports on the In-Service Date of assets for the reporting year.

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Replacement Cost	Reports on the Replacement Cost or Total Replacement Cost (replacement cost plus events) of assets for the reporting year.
Dynamic Charts	Reports on data copied from an external source. For example, data in an Excel spreadsheet can be copied and pasted into the Data field. Citywide will then use this data along with the parameter settings on the right of the Data field to generate a pie chart.
Profile Exceptions	Will report on mismatched or incorrect data in the Inventory list.
Fuel & Cost Report	Reports on Fuel and Cost information entered in Maintenance.
Skipped Events	Summarizes all assets that have skipped events for the reporting year.
Default Levels of Service Reports	
Condition	Reports on the Condition rating of assets. By default, this report will use the assessed condition of the asset; if a condition assessment doesn't exist the report will use an age-based condition.
Projected Condition	Reports on the Projected Condition rating of assets.
Risk	Reports on the Risk rating of assets.
Projected Risk	Reports on the Projected risk rating of assets.
Asset Age	Reports on the average age and average remaining useful life of assets.
Averages Reports	Reports on the average of several Lifecycle fields such as, the average Service Life.
Default Financial Reports	
Amortization	Reports on the Amortization schedule showing the depreciation of each asset for the year.
Transaction Report	Reports on different transactions (i.e., Adjustments) completed within Citywide for the reporting year.
Projected Amortization	Reports on the projected Amortization schedule of assets within the reporting year.
Work In Progress	Reports on the Amortization schedule for WIP (Work in Progress) assets showing the depreciation for the year.
Water	Reports on the Amortization schedule for water assets showing the depreciation for the year.
Wastewater	Reports on the Amortization schedule for wastewater assets showing the depreciation for the year.
Government Transfer	Reports on the Amortization schedule for assets flagged as Government transfers for a selected reporting year.
Contaminated	Reports on the Amortization schedule for assets flagged as contaminated for a selected reporting year.
Financial Exceptions	Runs a summary report showing asset Category and Segment detail grouped by Amortization Method, Estimated Useful Life, Units of Measure and/or Missing/Incorrect Data. This report can be used for data gap analysis.
Heritage	Reports on the Amortization schedule for assets flagged as heritage for a selected reporting year.
Leased	Reports on the Amortization schedule for assets flagged as leased for a selected reporting year.

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Product Updates & History

Within the past three years PSD has provided hundreds of releases including major and minor updates. As part of PSD Citywide's Upgrade Policy, and the software license, PSD Citywide is fully responsible for and manages all hardware, software, and data hosting associated with all our Citywide Software applications. Clients are entitled to receive all new versions and upgrades of Citywide Software free of charge as well as service packs issued promptly to fix problems reported by customers and deliver minor functionality and performance improvements.

Citywide releases updates and bug fixes on a bi-weekly basis to ensure all applications function properly. Major software updates to Citywide are performed quarterly to upgrade the system and add new functionality and software optimization. Users can also expect one-off releases on a case-by-case basis. Updates to Citywide modules are made on the server-side and are available to users as soon as the update is complete with minimal-to-no downtime. Citywide users can access any relevant information related to upgrades made to the software, all new capabilities, as well as bug fixes through the release notes button on the home screen. Mobile users may be prompted to install new versions of the mobile application when there is a new release.

Additionally, a monthly newsletter is sent to all Citywide software users featuring the latest software enhancements and how to use them, including helpful tips, tricks, and video tutorials. PSD hosts multiple annual User Groups across the country with all our client base where we share current plans and latest release information and ensure that we receive feedback directly from our clients, which heavily informs the direction of our development.

PSD hosts a virtual quarterly Product Town Hall where clients can attend a meeting to learn about new features, ask technical questions, and provide feedback that is incorporated into our product roadmap.

When a new version of the software is scheduled to be released, clients are given three or more months' notice. The new version of the software will include a scheduled rollover that is coordinated with a technical representative, the client and the PSD Citywide account representative who will verify the consistency.

Our quarterly release notes (available through our Support Center) illustrate some of the updates that our team provides for each module.

Citywide Assets:	
	OSIM data requirement capabilities for Ontario municipalities
	Define effective date for implementing ARO
	Introducing key value pair attribute type
	Ability to add EUL for ARO additions
	Additional API routes for adding condition assessments
	Create a new asset and link it to a GIS feature from the CW GIS viewer
	New deterioration curves for Asphalt and Concrete
	Link AM attributes to GIS attributes for automatic updates
	New ULC template for uploading asset usage/ mileage
	Performance improvement on grid load times
	Ability to bulk download files from the files and storage page
	...53 other technical issues and minor UI enhancements were addressed in this release.

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Citywide Maintenance:	
	Ability to attach PDF files using the Citywide Mobile application
	Searchable bottom sheets/ dropdowns across Citywide Mobile Application
	Introduced an internal Staff Request Portal
	Option to repeat seasonal equipment rate every year
	Upload seasonal rate on equipment via the ULC equipment sync template
	UX and pop-up improvements
	Performance improvements on Citywide Mobile application
	Work order summary report enhancements
	Map filters for daily overview on Citywide Mobile application
	Bulk API functionality for work orders, attributes
	New ULC template for syncing work order vendor costs
	Service Requests on Citywide customer portal
	Guest login for Citywide customer portal
	...34 other technical issues and minor UI enhancements were addressed in this release.

Product (Post-Implementation) Support

Direct Customer Support

Our Software Support Team is well-equipped to resolve technical difficulties experienced by the client throughout the duration of the contract and will be happy to engage with client staff directly throughout the troubleshooting process. Support is provided out of our London, Ontario offices, and is available from 8:30am to 5pm EST, Monday through Friday (excluding statutory holidays) though we will always return your call/email on the same day and will usually resolve any problem within 24 hours.

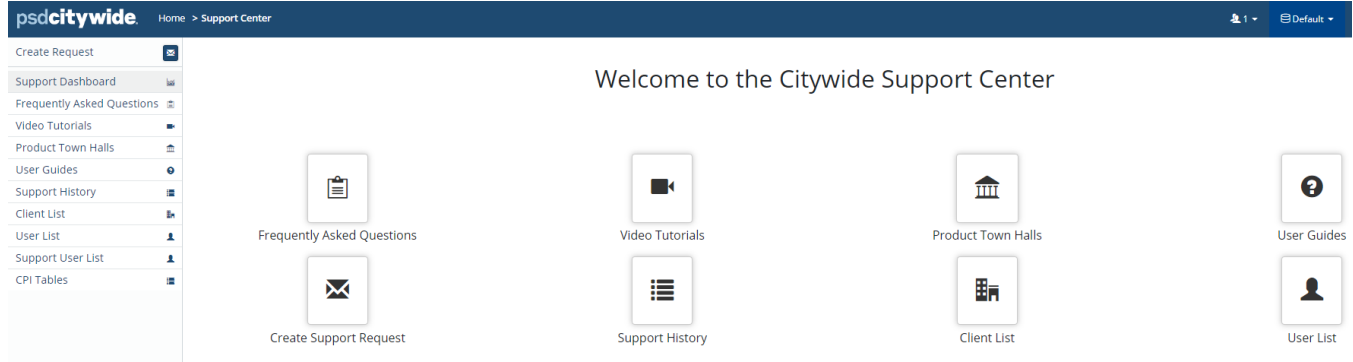
We provide the following direct support options:

- Telephone support is available from 8:30am to 5:00pm EST, Monday through Friday via the PSD Citywide telephone number at 519-690-2565.
- E-mail support is available from 8:30am to 5:00pm EST, Monday through Friday via the PSD Citywide support email at support@psdcitywide.com.
- Should clients require additional support beyond the above options or outside of specified business hours, this can be facilitated through the devoted Account Manager or Client Support Representative assigned to the client. The designated account manager will be available in PST from 8:30am to 5:00pm, Monday through Friday via email or phone call.

Citywide Support Center

Customer support is also available through the Citywide Support Center, which offers an FAQ page, video tutorials, the ability to create a support request directly through the system, detailed user guides. All these resources are provided as part of PSD Citywide's annual support and are available once the software solution has been implemented and is accessible to staff.

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Create Support Requests

All user request/troubleshooting tickets are tracked through JIRA including information such as date, time open/closed, problem type, and the fix is usually administered through direct communication via email or phone. PSD Citywide can run analysis to track re-occurrence of problem logging for specific clients. This client data will not be made available to any other client of PSD Citywide, but the client would have access to analysis of its own troubleshooting history upon discussion and the issuing of a formal, approved request.

Error Priority and Response Chart

If the Customer must contact PSD Citywide for support, our team will provide support based on the metrics below:

Error Classification / Description for reporting to VENDOR	Description & Expected Action(s) & Target Response Times from VENDOR
CRITICAL System cannot run. A time critical user job is stopped and affecting a significant number of users.	Response Time: Within 4 hours from the time PSD Citywide is notified of the Error (for Critical Errors first occurring during business hours 8:00AM to 8:00PM EST) Target Resolution Time: Every attempt is made by PSD Citywide to resolve the Error within <u>1 working day</u>
HIGH PRIORITY An important operational user job is stopped. A time critical user job is at risk of stopping or malfunctioning; an important function of the System is malfunctioning.	Response Time: Within 8 hours from the time PSD Citywide is notified of the Error (for High Priority Errors first occurring during business hours 8:00AM to 8:00PM EST) Target Resolution Time: Every attempt is to be made by PSD Citywide to resolve the Error within <u>2 working days</u> .
MEDIUM	Response Time:

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Error Classification / Description for reporting to VENDOR	Description & Expected Action(s) & Target Response Times from VENDOR
A non-urgent job is not executable. System malfunction has infrequent or minor user impact.	Within 2 working days from the time PSD Citywide is notified of the Error (for Medium Priority Errors first occurring during business hours 8:00AM to 8:00PM EST) Target Resolution Time: Every attempt is to be made by PSD Citywide to resolve the Error within <u>3 working days</u>
LOW The Error has no current impact on any end user. There is a locally identified cure or workaround available.	Response Time: Within 3 – 5 working days from the time PSD Citywide is notified of the Error (for Low Priority Errors first occurring during business hours 8:00AM to 8:00PM EST) Target Resolution Time: Every attempt is to be made by PSD Citywide to resolve the Error on a best effort basis.

User Guides

We also supply in-depth user guides that are accessible from within the software. These guides contain thorough explanations and screen shots that provide an outline of all key end-user and admin functions and processes in Citywide software. These guides are continuously updated with all future version releases.

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Assets User Guide



Maintenance User Guide



CPA User Guide



OLAP User Guide



Permits User Guide



Route Patrol User Guide



GIS User Guide



Asset Collector User Guide



Moving Assets in Mobile User Guide



Mobile Work Order Management



Decision Support User Guide

Ongoing Maintenance

As part of PSD Citywide's Upgrade Policy, and the software license, PSD Citywide is fully responsible for and manages all software and data hosting associated with all our Citywide Software applications. Users do not have to manage, install, or upgrade software, and require no additional third-party licenses, no additional onsite equipment, space, electrical, or onsite technical support staff.

Citywide releases updates and bug fixes on a weekly basis to ensure all applications function properly. Major software updates to Citywide are performed quarterly to upgrade the system and add new functionality and software optimization. Users can also expect one-off releases on a case-by-case basis. Updates to Citywide modules are made on the server-side and are available to users as soon as the update is complete with minimal-to-no downtime.

Citywide users can access any relevant information related to upgrades made to the software, all new capabilities, as well as bug fixes through the release notes button on the home screen.

Help & Support



User Guides



Latest Release Notes



Support Center



Support Tools

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In this section, users can see what has been added and a brief explanation of its impact. Additionally, a monthly newsletter is sent out to all Citywide software users featuring the latest software enhancements and how to use them, including helpful tips, tricks, and video tutorials.

As part of PSD Citywide annuity agreement, Annual Web Hosting includes vendor provided redundant Internet connections, Daily Tape/Drive backup both on and off-site of client data, 24 Hour video, on-site security, and fire suppression. As a result, our servers are physically and environmentally secure. Access to the main building requires an access card, and an additional level of security is then required to access the server room. The server room is monitored 24/7 and includes its own HVAC system and proper offsite store of database backups. With each software deployment, all application business data and backup data will be securely hosted and stored at PSD Citywide's London, Ontario location.

Citywide System Administration

Our cloud-based, or SaaS model has no physical need for indirect distribution as it is not distributed physically, nor does it require hardware on the client's end, and is deployed almost instantaneously, thereby eliminating the need for partners in its implementation and operating.

Clients access Citywide through any device that has browser capabilities, as users will only require the website address, a username, and a password for system access. We support all modern web browser providers, including Safari, Firefox, Microsoft Edge and Internet Explorer 11+, however Citywide tools are optimized for use with Google Chrome. The mobile application can be accessed via iOS and/or Android, and all modern phones and tablets are able to support this application.

Use of the software requires the same bandwidth to read emails and browse the web. Additionally, there are no bandwidth restrictions on data uploads and downloads, data storage capacity is unlimited, and there are no extra costs for out-of-the-box data storage.

Data and Servers

Currently, based on performance, our uptime is 99.99% and we are confident that we can maintain this standard. To protect all data, PSD Citywide keeps a disaster site located outside of the primary hosted systems. PSD Citywide performs nightly backups/recovery points that are stored on and off-site, which allows for the recovery time (RTO) of four hours as these backups typically take half a business day. PSD Citywide's recovery point objective (RPO) is up to 24 hours because it is our policy to perform nightly backups. The system Source Code is also backed up at an offline location in the United States.

Our organization has a strict internal policy relating to access to client's data. Only a select few within the organization can access the municipality's information and reasons for access are typically related to training or technical support requests.

Servers are securely stored in the PSD Citywide headquarters in the London, Ontario, Canada office. There are four layers of security to access the physical data servers. Access to the main building requires an access card, and an additional level of security is then required to access the server room. Access to the server room, and databases is limited to select individuals. As part of PSD Citywide annuity agreement, Annual Web Hosting includes vendor provided redundant Internet connections, Daily Tape/Drive backup both on and off-site of client data, 24 Hour video, on-site security, and fire suppression.

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To protect all data, Citywide software performs nightly backups/recovery points, and PSD Citywide keeps a disaster site located outside of the primary hosted systems. The Source Code of the system is also backed up at an offline location. Recovery of databases can be performed upon request. This is done at the database level, restoring the client's database with the requested date's data.

To ensure the provision of Emergency System Repair, PSD has failovers / disaster recovery plans in place, and we would also repair any hardware/software/networking issues as required. In the event of declaring a disaster, clients will be notified directly via e-mail and our websites.

PSD Citywide adheres to the Government of Canada definition of what constitutes a "privacy breach/incident." The overarching definition states that a privacy breach/incident is "the loss of unauthorized access to, or disclosure of, personal information." A privacy breach/incident is therefore characterized by an event where personal information is stolen, lost, or mistakenly shared.

Where PSD Citywide discovers or has reason to expect that a privacy breach/incident, or any other breach of security has occurred, PSD Citywide will document and contain the breach and notify the affected client(s) in writing as promptly as possible (at most within 48 hours of such discovery, or identification of a reason to suspect a privacy incident has occurred or is occurring). In the event of an investigation, PSD Citywide ensures that proper and timely discussion is carried out with the client, as there may be a need to obtain relevant information, user files, and user access logs.

Further formal correspondence with the affected client(s) will include but not be limited to:

1. a description of the circumstances of the privacy breach/incident and the known or suspected cause(s)
2. the duration of the privacy breach/incident (including confirmation of whether the incident is ongoing) and the date and time PSD Citywide discovered the privacy incident
3. the number of individuals who may be affected, the number of individuals whose personal information may be affected, and a description of any personal information that is affected by the privacy incident (if any)
4. the status of the privacy incident, including the estimated resolution time
5. a description of the steps that PSD Citywide has taken and will take to mitigate the risk of harm to affected individuals that could result from the privacy breach/incident

Pre-emptive Monitoring

Security threats and traffic are pre-emptively monitored through an IDS/IPS and a dedicated fulltime security/DevOps resource. PSD Citywide follows best practices for web security/vulnerability testing including but not limited to OWASP top 10, sanitizing data inputs, etc. To identify any vulnerabilities within our solution, PSD Citywide conducts regular code review as well as periodic testing in the system. If any vulnerabilities are identified, PSD Citywide updates the system as necessary.

Minimum Qualification Requirements

PSD has an extensive history of delivering CMMS solutions to municipalities across North America. Our suite of modules allows our team to deliver a cloud-based system that integrates with other modules in Citywide along with other 3rd party services. PSD has delivered hundreds of similar software packages over the past 15+ years and we are confident that our solution can meet all of the County's needs.

PSD Citywide proposes a multi-phased approach for implementation. As seen on the table below, Phase 1 will encompass the implementation of Citywide Assets in order to establish the asset register, implement the Decision Support sub-module and integrate with the County's ESRI ArcGIS database. Phase 2 would see the implementation of Citywide Maintenance along with Route Patrol and all of the County's desired integrations. The proposed implementation plan is a sample only and should take approximately 13 months. Additional information is required to create a firm implementation timeline and plan.

The phases would align with the following approach:

Phase	Module	Timeline
Phase 1	Citywide Assets Implementation - Asset Register Set Up - ESRI ArcGIS integration - Decision Support - Data conversion	5 Months
Phase 2	Citywide Maintenance Implementation - Work Orders, Service Requests, PM Events - Route Patrol - Mobile Application	8 Months

The work plan outlines project meetings, testing, training, configuration, and planning required for this project. The County can expect bi-weekly meetings throughout the duration of the project in order to ensure all project details and updates are being communicated. The details of various meetings are outlined in the work plan below.

Phase 1: Assets Implementation Work Plan

1. Project Initiation & Planning
1.1. Project Document Creation & Kick-Off Prep To ensure a clear understanding of the scope of work, our project team will develop materials that focus on project vision/direction, objectives/outcomes, anticipated benefits, and proposed timelines ahead of the kick-off meeting. Our project manager will also generate a project register, a tentative project plan, and complete any additional project documentation required for this engagement.
1.2. Project Kick-Off Meeting

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Our assigned project manager will hold a formal project initiation conference call with key stakeholders to establish points of contact, build initial consensus on project approach, assign responsibilities, and ensure all initiating tasks are complete before work begins. Core members of our team will also be available to answer client questions and explain aspects of the proposed implementation approach in more granular detail.

1.3. Project Plan Approval

Our project manager will work with the client to finalize a tailored project plan which documents all identified project goals and objectives, the roles and responsibilities of project stakeholders, as well as project risks and methods of mitigation.

The project plan will also contain a finalized Project Schedule that displays assigned tasks, milestones, and due dates in Gantt chart format. All resourcing and scheduling constraints from both the provider and client sides will be considered to ensure a realistic and achievable plan is developed. County staff are given access to the schedule online so that they can actively monitor project progress in real-time.

Key documents such as the Data Migration Plan and Preliminary Training Plan can be developed at this stage as well, depending on the needs and capabilities of the County.

Milestone: Final Project Plan Approved

2. Data Gathering

2.1. Client Provides Data

Each department is required to compile all asset data that they wish to migrate to the new system. Data gathering and migration will require the most effort from the client's team.

Data sources may include, but are not limited to, the following:

- Accounting Fixed Asset Registers
- Insurance Asset Registers
- PSAB Asset Registry
- Access or Excel files

We will advise the client on data gathering best practices, and representatives will be available to provide support and answer questions throughout this process.

2.2. Data Moved into Templates

Our data analysts will take the data that has been gathered and delivered by the client and will begin the process of populating data upload templates that will be used to migrate large quantities of information into Citywide Assets.

This process enables our staff to manage the data migration process more thoroughly, while instilling maximum confidence in the reliability and completeness of the database. The client can also easily confirm that the right information is being collected and uploaded.

2.3. Data Gap Analysis

After obtaining all relevant infrastructure information at the highest level of detail available, our team will review the populated templates for consistency and completeness, identifying any gaps in current datasets and determining where the client should focus its efforts to eliminate those gaps.

Our staff possess extensive experience with data gap analyses, data consolidation, and cross-system coordination of asset data, and will focus efforts on areas that will allow the client to get the solution up and running as quickly and efficiently as possible.

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2.4. Data Review Meeting Our project manager will schedule a meeting with appropriate County staff to review the results of the initial gap analysis, including any inconsistencies we have found within the data or additional data that must be supplied by the client to move forward.
2.5. Client Provides Outstanding Data Additional time can be allotted for the client to collect or create solutions for any missing data identified throughout the gap analysis. We can assist with this process and provide advice to the County on the best practices for filling in the gaps. The stage's duration may be adjusted at this time based on the scope of the outstanding data and the time the client will need to provide it. This stage will be considered complete once our team has received all applicable data in a format that can be uploaded to the system.
Milestone: All Data Gathered and Analyzed
3. Configuration & Analysis
3.1. Data Formatting & Upload Our assigned data analysts will load all client data into Citywide Assets and begin a thorough analysis of data within the system. Any additional fields that are necessary for system use will be considered, including condition ratings and replacement costs.
3.2. Client Profile Review Our project manager will provide a summary of all uploaded data to the County via an export to excel or will enable the client to access their database within the system, depending on the County's preference and expressed proficiency with Assets. Time will be allotted for the client to perform a review of their asset inventory/ reporting. Assigned staff will work with the client to implement any final recommendations or make any required adjustments at this time. This stage will be considered complete once the client formally signs-off on their data within the system.
3.3. Activate GIS Viewer & Decision Support Citywide serves as a repository for spatial data that is served up to an associated web-based "viewer", with potential to draw from and serve third party systems. Key design principles include an intuitive interface with high visual impact, to produce demonstrable maps while maintaining the required internal functionality that an organization needs. GIS functionality works across the other Citywide modules and allows for the viewing of asset location through the Assets database, mapping assets, work orders and project prioritization through filterable reporting and viewing. The integration services will be based out of PSD Citywide's head office in London, Ontario. The integration is performed remotely. Our project manager will organize discussions with the client to gather information as required. Municipalities typically implement an automatic integration between their solutions, and this is the approach that we recommend for this implementation.
3.3.1. Analysis of GIS Data Templates are delivered to the client in order to collect GIS Data for analysis. The quality and quality of data is assessed. Based on the data analysis, a detailed work plan is formulated for the integration.
3.3.2. Configuration of Integration

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We recommend an automatic integration with the client's ArcGIS system. Citywide has an Open Geospatial Consortium (OGC) compliant GIS Viewer that connects to existing Web Feature Services (WFS) and Web Map Services (WMS) from any compliant service, and which is fully supported by ESRI ArcGIS servers after enabling WMS/WFS services. We typically consume map services and features services from ArcGIS to visualize spatial data for Assets and their associated geometry. By identifying a common ID between the assets in GIS and our system, Citywide Software can pass standard HTTP GET arguments to load our viewer with them. Our application can be modified to take such arguments (i.e. a link generated from a feature in the GIS system) to load our system directly to the related asset.

3.3.3. GIS Go Live

We will ensure the client has full access to the new data in Citywide Assets and has access to GIS capabilities for each phase's unique asset categories. Our Project Manager will then send confirmation that the stage has been completed.

Below is an example of the end-result in Citywide once integrations have been completed:

Layer	AM Linking Key	GIS Linking Key	Linked Features	Missing GIS Key ?	Non-Unique GIS Key ?	Non-Unique AM Key ?	No AM Match ?	AM Match Conflict ?
Bridges	Import ID	fid_new	5.56% (1 / 18) ?	0	0	0	17	0
Misc. Lands	Import ID	fid_new	97.06% (264 / 272) ?	1	3	1	2	0
Roads (Centre)	Import ID	fid_new	91.80% (862 / 939) ?	6	2	1	68	0
Row	Import ID	fid_new	98.33% (2,059 / 2,094) ?	0	0	0	35	0
Sanitary Mains	Import ID	new_fid	99.77% (1,770 / 1,774) ?	0	0	1	3	0
Sanitary Manholes	Import ID	fid_new	99.82% (1,619 / 1,622) ?	3	0	0	0	0
Sanitary Pumpstations	Import ID	fid_new	72.22% (13 / 18) ?	0	0	3	2	0
Storm Basins	Import ID	fid_new	99.76% (4,940 / 4,952) ?	0	2	0	10	0
Storm Mains	Import ID	fid_new	97.24% (2,743 / 2,821) ?	0	0	42	36	0
Storm Manholes	Import ID	fid_new	96.01% (1,204 / 1,254) ?	4	39	0	7	0
Storm Pump Stations	Import ID	fid_new	50.00% (1 / 2) ?	0	0	0	1	0
Traffic Signals	Import ID	fid_new	0.00% (0 / 32) ?	0	2	0	30	0
Water Hydrants	Import ID	fid_new	97.19% (1,244 / 1,280) ?	0	0	0	36	0
Water Mains	Import ID	fid_new	97.33% (3,176 / 3,263) ?	0	0	0	87	0
Walkways	Import ID	fid_new	75.75% (431 / 569) ?	0	0	2	136	0
TOTAL			57.17% (20,327 / 35,558)	14,662	48	50	470	0

3.4. Decision Support

3.5. Decision Support Training

3.6. Single Sign-On Integration

3.6.1. Host Initial Meeting and Gather Information

Our assigned developer will meet with the client's IT representative to gather information about how authentication is implemented within the client organization. The discussion will determine:

- What type of Identity Provider is used in the client organization (Active Directory, Active Directory Federation Service, Azure Active Directory, Keycloak etc.)
- What protocol is going to be used to establish a connection between Citywide and the client's Identity Provider (SAML2, OIDC, OAuth2)

Once our developer defines the type of Identity Provider used at the client organization, and the protocol needed to establish a connection between Citywide and the client's Identity Provider, they will gather any additional information to complete the SSO configuration (depending on the client's protocol) and determine required parameters

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(based on the client's previous infrastructure). If needed, a follow-up meeting can be booked to discuss further requirements at this time.
3.6.2. Establish Connection We will create a test database within Citywide to ensure that the configuration is defined within a sandbox environment. Our developer can initially work with the client's IT representative through a screenshare to complete basic initiating steps, if necessary. In some cases, the client will have to complete some configuration on their side. Below is an overview of the key tasks of this stage: - Our developer will confirm with the client what metadata files (provided as an XML file or via URL pulls) the client must send to establish a connection. The client will then send this data to our team for the configuration purposes. - Our developer will configure SSO on our end and send the redirect URL. - Our developer will host a final working session with the client's IT representative to set up a handful of test accounts, involving the setup of usernames with attributes and email addresses and the completion other key tasks required to configure one-to-one mappings between Citywide users and their corresponding non-Citywide credentials. The duration of each working session depends on many factors, and in our experience can be completed in a 15 minute session or over two weeks depending on the client's established rules, firewalls, Identity Provider settings, and other considerations. For this reason, clients typically ensure a test user is on-hand during the working sessions to better troubleshoot issues or roadblocks at the time of configuration. Once PSD Citywide authenticates, the client server will send a payload that confirms that the user is authenticated.
3.6.3. Client to Test Connection Typically, one to two weeks are afforded for client testing of the SSO connection, depending on the timing of the testing period and the resource availability of both PSD Citywide and the client. Our assigned developer will be available throughout this period to support the client with testing and to resolve any issues that arise.
3.6.4. Connection Deployed Once it is confirmed that the connection is working as expected, our developer will complete go-live and move the connection to the client's Citywide production database. At this point, County users will be able to login to Citywide with the same username and password stored in their Identity Provider. The sandbox environment will be disabled after go-live so that the client can continue using it as a test database moving forward.
3.7. Client Profile Sign Off
Milestone: Client Sign-Off on Data, Assets, GIS Viewer, Decision Support, and Single Sign-On are Active and Configured
4. Administrator Training
4.1. Assets Admin Training Training & Support Specialist will host extensive hands-on training workshops with departmental subject matter experts and designated Admin or "Power" users on all functions and applications of Citywide Assets including GIS Viewer and SSO Integrations. Each training session will utilize

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a demo database that replicates the client's existing Citywide database. This ensures that trainees undergo training with familiar data in a recognizable software environment to maximize retention of software functions among client staff.

The training workshops are intended to ensure the client is familiar enough with the core functionality and flow of the Citywide Assets, GIS viewer, SSO, and mobile applications to serve as admins of the system. We use a "Train the Trainer" model so that key users will be trained and comfortable with system functionality to the level where they can conduct in-house end-user training with additional users. Clients may choose to include additional staff members in this training session. The extent and duration of this training will vary depending on the requirements set out by the project, but typically covers admin functionality such as creating users, setting permissions & notifications, in addition to standard functionality such as reporting, updating asset information, and the management of assets and asset data within the system.

Milestone: Users Comfortable with Core System Functionality

5. User Acceptance Testing

5.1. Testing Execution

Milestone: User Acceptance Testing is Complete and Signed-Off

6. Go Live

6.1. Go-Live

Our project manager will be in direct contact with the client to facilitate our "one-click" go-live milestone, maintaining communication with staff.

6.2. Go-Live Support

At this time, and immediately following go-live, our implementation team will be available for questions and assistance to ensure a smooth corporate transition to the use of Citywide Assets and its add-ons.

Any deficiencies related to system configuration, system integration, or data migration discovered during go-live will be corrected at no extra cost to the County. Following official go-live processes, the County will begin post-implementation support provided by our technical support team, who will be available via our Support Center to help resolve issues and answer questions.

6.3. Project Closure Documentation

Our project manager will compile key findings from the implementation and include them in a final project close-out report that will be presented to the client. The report could include an overview of key events and activities, significant variations, lessons learned, and recommendations for future steps the client can take to expand their use of the application. As needed, our project manager can host a close-out meeting to review the project report with client staff, or present key findings to stakeholders.

6.4. Project Sign Off

Once the client has full access to Citywide Assets the project will be officially handed off to the client.

Milestone: Citywide Assets Fully Implemented

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Phase 2: Maintenance Implementation Work Plan

1. Project Initiation and Planning

1.1. Intro Call and Kickoff Meeting

1.1.1. Intro Call with Key Client Resources

During this informal meeting, our project manager will gather more information to begin the detailed project plan to be discussed during the kick-off meeting.

1.1.2. Conduct Kick-Off Meeting

Our project manager and senior advisor will hold a project initiation conference call with client stakeholders. At this meeting, we will work with client staff to fully comprehend the desired maintenance and operations management requirements (configurations, processes, and data) to be incorporated into the system and will perform a review of the acquisition templates and the proposed work plan.

1.2. Detailed Project Workplan Updated and Approved

Our project manager and senior asset management advisor will incorporate all feedback gained from stakeholders during the project initiation stage into the work plan. At this stage, the project plan is approved by the client, Mavenlink is updated with dates and baselines.

Milestone: Project Plan Finalized

2. Data Gathering, Analysis, Formatting, Configuration

2.1. Blank Data Templates Delivered to Client

Our team will finalize the System Configuration/ Data Acquisition Templates and submit them to the client. The data gathering templates will be designed to consolidate data in a standardized manner based on thorough client input.

Preparing these templates at this initial stage ensures maximum confidence in the data gathering and configuration process by allowing client staff to verify that the right information will be collected and migrated into the system. It also allows our team to manage the system configuration process more thoroughly in future stages.

Below is a sample blank data acquisition template used by PSD Citywide:

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Name		Service Requests	Work Orders	Route Patrol	GIS	Daily	Dashboard	Reports	Timesheets	Private Notes	Public Notes	Schedule
	View											
	Create											
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						End User Permissions						
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2.4. Template Review Meeting

Our project manager will schedule a meeting with appropriate County staff to review the results of initial data gathering efforts, including any inconsistencies discovered within the data or immediately apparent additional data required by the client to move forward. Our staff will suggest methods to correct these inconsistencies or obtain outstanding information necessary to move forward in the project at this time.

2.5. Data Configuration and Upload

After obtaining all relevant information at the highest level of detail available, we will upload all collected data and information into Maintenance via the Upload Center and begin the process of formatting data within the system.

Milestone: Completed Templates delivered to PSD Citywide. Data uploaded into Citywide.

3. Maintenance Configuration

3.1. Prepare & Deliver Testing Plan

Our implementation specialists will develop a user acceptance testing (UAT) plan to validate that key business requirements are met by the system and to instill further confidence in admin users while using the new system prior to go-live. The testing criteria/plan will be agreed to in conjunction with the client and will be used to ensure users can perform the items listed and are prepared for closing the configuration milestone. We will work with the client to finalize applicable functionality that will be tested based on the defined scope of work. Below are portions of defined Administrator acceptance requirements developed for a previous project:

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#	Acceptance Requirement	Critical Yes	No	Completion Date	Tested By
1	Create a new Service Request Type under Home>MM>Work Flow>Service Request Types	✓			
2	Create a Service Request and add a customer, property/location, responsible person, notes	✓			
3	Create a new Work Order Type Group under Home>MM>Work Flow>Work Order Types				
4	Create a new Work Order Type under Home>MM>Work Flow>Work Order Types	✓			
5	Attach an existing attribute and a new attribute to your new Work Order Type	✓			
6	Create and attach a Process to your Work Order Type				
7	Create a Service Request Notification and a Work Order Notification	✓			
8	Create a Work Order and attach workers, notes & assets	✓			
9	Update the Work Order Status and Create a Child Work Order	✓			
10	Approve a Service Request into a Work Order from the Service Request grid	✓			
11	Link Service Request Type to Work Order Type so a Work Order auto fills information.				
12	Filter your Work Orders on the Work Order grid using Advanced Filter				
13	Update your Work Order grid Columns and Create a Column Set for yourself				
14	Display & create Work Order via the GIS built-in map viewer	✓			
15	Search addresses and geo-locate with accuracy via an custom address geolocator				
16	Setup Your Dashboard Widgets under Home>MM>Dashboard	✓			
17	Monitor Work Orders via report dashboard and allow for drill-down detail				
18	Create and Save a Custom Work Order Report under Home>MM>Reports	✓			
Name:					
Position:					
Date:					
I have reviewed the features and functions for the Works Implementation Project and agree that they are appropriate to my business area and attest that I was able to perform all my expected job function tasks and activities normally or have indicated all the issues preventing me from performing my duties as defects to be reviewed and resolved:					
3.2. Test & Refine Maintenance Configurations After client-supplied data has been formatted within Maintenance to be in-line with client specifications, our team will work with the client to test specific scenarios in the system as well as provide supplemental training and tutorials for clients as-needed. This enables key users to continuously learn and improve their understanding of the system, and ensures the system is functioning as expected, before beginning UAT and end user training.					
3.3. Works Processes, Configurations & User Profiles Finalized At this time, we will adjust and finalize Maintenance processes, configurations, and user profiles. Our team will work alongside client staff to complete any refinement or modification efforts to transition to user acceptance testing.					
Milestone: Configuration of Citywide Maintenance Complete					
4. Admin User Training & Process Workshops					
4.1. Process Workshop Existing processes at the County or in current systems will be reviewed, and recommendations can be made to better enable the client to use the application's available functionality. This working session will involve our implementation specialists working with client staff to set up workflow scenarios in the system, giving the client a better understanding of the software. Our team will also gain a better sense of the County's processes, allowing us to build scenarios into Citywide. This session can also include an analysis of end user training requirements. This task					

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typically lasts one working session, with initial time allotted to preparation, depending on the client's unique needs. To conclude, our project manager will develop and deliver a summary document detailing significant events/ circumstances that impacted the process analysis and workshop.

4.2. Admin User Training

Our team will facilitate user training sessions for the County staff who will serve as administrators of the system, including IT personnel and analysts, as determined by the client. Typically, Maintenance admin training includes a session devoted to service request, work order, and maintenance and operations management functionality. The session is typically one day and will provide administrators with a deep understanding of key operations and maintenance management functionality including: how to use the administrative section, how to issue work orders/service requests/preventative maintenance events, resource costing, how to utilize reporting functionality, and how to access information for support.

Milestone: Key Users Are Trained and Comfortable with the System

5. Third Party Integrations with Citywide Maintenance

5.1. Integrations Requirements Gathering

The goal of is to understand the client's needs for integration. Stakeholders from different departments will be engaged in order to define clear objectives and expected outcomes for each integration. Existing systems and data flows will be documented.

5.2. Solution Design – Integration Development

Once the goals of the integration are finalized, a blueprint for the integration will be created. Appropriate integration tools or platforms will be selected at this stage. The blueprint will include data mappings and transformation logic, while leveraging existing API routes found in the Citywide API library and/or modifying/creating new API routes to meet requirements.

5.3. Integration Testing

Before being taken out of the testing sandbox, the integration will be tested to ensure it works correctly and as intended. Where possible, testing will be automated to save time and reduce errors.

5.4. Go-Live

The integration will be transitioned to full production use, while under close monitoring. A support team will be available during the initial days to address immediate issues. Communication channels for feedback and reporting will remain open.

Milestone: Integrations Completed and Signed-Off

6. Route Patrol Implementation

6.1. Activate Minimum Maintenance Standard (MMS) Compliance Status

Our development team will activate a script which will update the Route Patrol each night, ensuring that the system is tracking valid patrol and asset compliance status for each day. The assets that are attached to each route throughout the configuration process will be evaluated initially, and users will be able to attach other assets moving forward.

6.2. Configure Resources: Deficiency Codes

We will work with the client to establish and configure deficiency codes within the system. This work will involve the following key tasks:

Creating Deficiency Codes

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Configuring Deficiency Resolution Time and Work Order Types Configuring MMS Trigger Attributes
6.3. Configure Resources: Routes We will work with the client to establish and configure routes within the system. This work will involve the following key tasks: - Create a Route from the Route Grid - Input Details - Attach Assets - Attach Resources - Review Route Details
6.4. Create Route Schedules Our team will work with the client to create a Work Order Type for Scheduling Route Patrols. This work will involve the following key tasks: - Creating a New Work Order Type Group - Creating a Route-Work Order Type - Configuring the Patrolling Schedule - Configuring Mobile App Preferences
6.5. Route Patrol Testing Our implementation specialists will develop a system testing plan to validate that key business requirements will be met by Route Patrol, and to instill further confidence in the new module. Patrollers and key users will then have a designated period to go out and use the system to ensure that it meets their standards and agreed acceptance criteria. Our team will be available throughout this time to offer support and address questions and agreed upon additional requirements at this time. A testing criteria/plan will be developed with the client. This plan will be followed to ensure users can perform key functions. Sample acceptance criteria are depicted in the Figure below.
Milestone: Client Sign-Off on Data, Assets and Resources Configured, Testing Complete
7. User Acceptance Testing
7.1. Testing Execution Our team will work with client staff to follow a rigorous testing routine to test and refine system configurations. The Maintenance implementation team will be available for questions, assistance, and additional training (if needed) during this time. We perform testing for administrative functions, preventative maintenance, service requests, and work orders, each with distinctive acceptance requirements. During this stage of the project, the Maintenance Database is in a test environment. All training and testing transactions can be removed prior to Go-Live. We can create a sandbox environment (copy) for testing and training.
Milestone: User Acceptance Testing Is Complete and Signed-Off
8. Supplemental Admin Training
8.1. Citywide System Administrator Training The Admin Training and process workshop in stage 2.0 will have provided the client admin and Subject Matter Expert (SME) users with a basic understanding of the system functionality and the administration of the core Work Orders and Service Requests functionality. During the

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configuration stage, additional admin and configuration training will continue in smaller manageable sessions. Depending on the project scope these training sessions may include:

- Citywide Core Administration (Users, Roles & Permissions)
- Scheduled & Preventative Maintenance Activities
- Creating and Managing Inspections
- Parts & Materials Management
- Resource Costing (Workers & Equipment)
- Customer & Properties Management

Milestone: System Administrators are Trained in Advanced Functionality

9. End User Training & Go-Live

9.1. Go-Live Planning

9.2. End User Training

These training sessions are scheduled once our project team has determined that the software is configured, and admin users are already comfortable with the system. Multiple sessions can be scheduled in a day with any number of users in attendance. We will ensure the client's end users are comfortable with the system and able to access all information and documentation required to fully use Citywide Maintenance. Role-based user training will focus on tasks related to the client's identified user roles.

9.3. Configuration Transfer

9.4. County Go-Live

Milestone: County Go-Live

10. Go-Live Support

10.1. Support Questions & Meetings

Our project manager will be in direct contact with the County on the day of full system go-live, maintaining communication with staff during this crucial step. At this time, and immediately following go-live, the Maintenance implementation team will be available for questions and assistance to ensure a smooth corporate transition to full use of Maintenance and active support. Following official go-live processes, our support team will provide additional check-in support at the 30, 60, 90 day marks post-implementation. All deficiencies related to system configuration, system integration, or data migration discovered during going live will be corrected at no extra cost to the client. We will also provide further testing and tutorials as needed to ensure a sufficient level of comfort as they begin to fully use their new system before transitioning to Citywide Support.

Milestone: County Has Support at Go-Live and For a Period After

11. Project Closure

11.1. Project Closure and Transition to Support Meeting

This meeting can include a presentation of key findings to stakeholders and the project owner and will mark the transition to ongoing Citywide support via our Support Center.

11.2. External Project Report

If required, our project manager can compile key findings from the Maintenance implementation and include them in a final project close-out briefing. The report can include an overview of key

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events and activities, significant variations, lessons learned, and recommendations for future steps that the client to take to expand the use of their application.
Milestone: Implementation Complete and County Transitioned to PSD Citywide Support

Understanding of Project and Project Approach

Project Management Methodology

Our assigned team will provide full implementation management services throughout this engagement, including direct oversight of project initiation, system installation, set up, configuration, user training and testing, project close-out, and post-implementation support. Our implementation specialists will ensure client staff have the opportunity for ongoing knowledge and process development during this project as they work directly with our team of subject matter experts. Our project manager will maintain strong project, communication, quality assurance, risk management and change management processes which draw from the Project Management Body of Knowledge (PMBOK) 6th and 7th Editions to ensure all client expectations are met in the agreed upon timeline for the agreed upon budget.

Software Implementation Project Success Criteria

- Project plans and requirements are well-defined, and all key stakeholders are engaged via controlled management and communications protocols for the duration of the project.
- All configuration is finalized, integrations and connections are established and stable.
- All key admin and subject matter experts (SMEs) are trained and comfortable with the software to the extent that they can complete future end-user training.
- User Acceptance Testing is complete and formally signed-off on.
- Citywide software implementations are considered complete once client organizations have signed off on the system and have successfully transitioned to on-going PSD Citywide Software Support.

Overview of PSD Citywide's Project Management Office

Projects that are delivered on time and on budget warrant effective management and coordination. As a result, all active projects are managed through our Project Management Office (PMO) providing high level support and coordination to individual project managers and implementation teams from one centralized hub. The PMO also manages PSD Citywide's internal project processes and templates and uses our devoted project management software system to monitor and control all client projects to display the anticipated workloads of each assigned staff member to gauge corporate capacity.

Key Project Tools, Documents, and Artifacts

Our certified project managers use well-defined tools and processes to track, review, and regulate project progress and performance, actively working with their team and client stakeholders to ensure required activities are performed on time and within budget to deliver value. As part of this proposal, our team will propose and finalize key project plans, documents, and artifacts to aid in the management of this project, which include but are not limited to the following:

1. **Project Charter** – initiates the project and captures key information for planning purposes.
2. **Project Management Plan** - captures the full scope of the project and defines approaches.
3. **Project Schedule** - displays assigned tasks, milestones, and due dates in a Gantt chart.
4. **Project Activity Register** – captures ground-level internal and client responsibilities.

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5. **Communication Plan** - sets clear expectations and protocols for facilitating communications.
6. **Risk Register** - provides information on issues that may impact project execution.
7. **Change Request Management Plan** - documents formal change management processes.
8. **Quality Assurance Management Plan** – documents formal QA and testing processes.

1) Project Charter

Once selected as the vendor, PSD Citywide and the County will generate and sign this document to formally authorize the undertaking of the project by PSD Citywide as the vendor of choice. This document also documents high-level information including measurable project objectives and related success criteria such as:

- Project purpose and high-level requirements
- Overview of stakeholders and project sponsor/manager
- Summary budget, schedule, and key dates
- Any approval and/or sign-off requirements

2) Project Management Plan

At a high level, the project management plan ensures a common understanding between the County and PSD Citywide on project scope and approach by capturing all relevant information defined during the initiation and planning stages of the project. This information typically includes details on finalized key deliverables and timelines, relevant stakeholders, assumptions/constraints/risks. The project plan will also include a project schedule (described further below) which illustrates project timelines and task durations.

The plan is also used to manage and assess performance throughout the project and ensure project outputs are complete, correct, and meet client expectations. Our assigned project manager will follow this plan throughout the engagement while maintaining consistent contact with stakeholders to communicate the measured progress being made. The project manager will also use the plan to maintain full disclosure of any potential delays that would impact the timeline, should they arise, and recommend all subsequent efforts to ensure successful delivery within set timeframes.

3) Project Schedule

To assist with monitoring and controlling processes, we use leading project management software to quantify, manage, and control all aspects of the project, including the schedule, resource allocation, and cost. Our project managers also use the system to conduct Earned Value Analysis (EVA), which is a standard method of measuring project progress at any given point in the project's duration against the agreed upon schedule and budget. This enables the project manager to tightly monitor how any variances are expected to impact final timelines as the project proceeds and adjust accordingly. Client staff are given access to the schedule to monitor progress in real-time.

4) Project Activity Register

Our project manager will capture internal and client responsibilities that are more granular in a project activity register, which will be always available to the client from project kickoff onward. This document tracks smaller and more specific items assigned to PSD Citywide or the County that are part of the higher-level goals, tasks, stages, and phases that have been captured in the project plan and schedule.

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5) Communication Plan

The communication plan clearly documents which City stakeholders PSD Citywide staff members are communicating with each other, how frequently, and at what points throughout the project. Our project manager typically communicates via email and schedules weekly or biweekly status update calls with the County's project manager, but the plan will also identify additional communication channels and key methods of communications if required.

6) Project Risk Register

Risk Management Planning and Register

Project Risk Management processes are determined at the kickoff meeting and can be updated throughout the project if new risks are identified. Our team will consistently perform risk analysis (both qualitative and quantitative) throughout the project to prioritize individual project risks based on their probability of occurrence and the potential impact on the project if they were to occur. This assessment will be based on extensive feedback gained from the County at project kickoff, as well as based on our experience implementing asset management programs and systems for hundreds of public sector clients.

Our team will utilize a risk register tool that will be used to document and mitigate potential and actual risks. The County will always have access to this register and the register will be reviewed during regular check-ins between PSD Citywide staff and City staff.

IMPACT DESCRIPTION	IMPACT LEVEL	PROBABILITY LEVEL	PRIORITY LEVEL	MITIGATION NOTES	OWNER
Client delays on providing feedback or providing data can lead to PSD resourcing conflicts	3	2	6	Bi-weekly check-ins with the project manager and continued schedule review	PSD Project Manager
Misalignment of expectations can lead to scope creep, which may lead to cost overruns	4	1	4	Deliverables & requirements have been clearly defined & communicated through both the RFP document and the project plan; review all requests against the scope & deliverables to clearly communicate out of scope items	PSD Project Manager
Poor quality data or data that does not relate well to CityWide or other data-related items can lead to issues with system use and customer satisfaction	4	3	12	Data has been requested early in the project to ensure we can communicate any mapping or other issues and provide mitigation strategies on a case-by-case basis	PSD Project Manager
Staff changes can lead to either delays or quality issues if others are not briefed on key project items	4	1	4	Provide monthly updates to the project owner, ensure project documents are stored properly and the project workspace & registers are up-to-date	PSD Project Manager

Sample Risk Register

Reserve Analysis

Depending on the scope and scale of the project, our PMO can use reserve analysis as part of its project management processes to determine the amount of contingency and management reserves that must be incorporated into the project's baseline and overall schedule. The project manager may employ either type of reserve in agreement with the client organization.

Contingency reserves can be included in the project timeline to account for schedule uncertainty. These are reserves of time, or a percentage of estimated activity duration, that are allocated at the discretion of our project manager to account for risks that are identified and accepted by both the County and the PMO. These are determined at the kickoff meeting and throughout the duration of the contract. Our project manager can then incorporate duration estimates into their monitoring and controlling process, drawing on contingency reserves when necessary.

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Management reserves are a specified amount of the project budget that is reserved for unforeseen work that is within the scope of the project, or comes about from an agreed change in scope, and would only be included if it were deemed necessary by both PSD Citywide and the County through formal change management processes. Our project manager would then incorporate cost estimates into their scheduling to consider cost trade-offs and risks to achieve optimal budget allocation for the project.

7. Change Request Management Plan

To address proposed changes that arise throughout the project, PSD Citywide staff will work with key decision makers from both PSD Citywide and the County to approve, defer, or reject formalized change requests identified through submitted **Change Request Forms**. Change requests are formally processed by the project manager via our change order process, and once a change request has been formally documented, PSD Citywide and the County can:

- Perform a review to consider and assess the proposed changes that are anticipated to have an impact on time, cost, and human resources.
- Evaluate the effectiveness and risks.
- Decide on the proper course of action, which will be based on tracked costs against both the approved project budget and timeline.

All change requests and changes are documented in a formal **Change Log** and are communicated to relevant staff and stakeholders to ensure follow-through on the change. Once a formal change request has been made in writing, multiple options as to how to proceed would be presented to the County and the project plan and timeline would be adjusted accordingly. Extensive approved changes may initiate a re-quote for services rendered, but this would be contingent upon written approval from the County.

8. Quality Assurance Management Plan

In project management, quality assurance, as a delivered performance or result, is “the degree to which a set of inherent characteristics fulfill requirements” (ISO 9000 [18]) and therefore the focus of quality assurance is on the processes used throughout the project. PSD Citywide acknowledges that a failure to meet quality requirements, including failure to provide key deliverables and hit schedule deadlines, can have serious negative consequences for any or all the project’s stakeholders.

As a result, PSD Citywide implements project and quality assurance management processes through its Project Management Office to ensure proper management and control of the project and to ensure product quality requirements are addressed to meet stakeholders’ objectives. The quality measures and techniques used by PSD are specific to the type of research, consulting and software deliverables being produced, as they have been developed in-house based on best practices, with a specific focus on the public sector, and draw from the latest *Project Management Body of Knowledge 6th Edition*. Below is an overview of PSD Citywide’s Quality Assurance Management processes.

Communication protocol for both external and internal stakeholders

Due to the size and scope of the project, clear and efficient communication between the County and PSD Citywide is vital to project success. In the kick-off meeting, the main point of contact for PSD and the County will be decided upon. All high-level client communications, including project progress updates, scheduling future meetings/workshops, sending of data and change management should be done between these individuals unless stated otherwise throughout the project.

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The key processes involve:

1. Starting with the kick-off meeting, PSD Citywide's project manager will host weekly check-in meetings and every month, provide a project status update that includes progress of tasks completed to date and the anticipated timelines of milestones of activities moving forward.
2. Incorporating feedback from the County as findings emerge in the project update meetings, by documenting exchanges with clients in quality reports, status updates, task registers, change logs for product enhancements, etc. to ensure accountability.
3. Ensuring that the deliverables being provided to the client are correct through a stringent verification process. No document will be sent to the client without a strict review for quality, including confirmation that it includes what needs to be included, and that the documentation does not contain spelling mistakes, etc.

Implementation Project Plan Development

To ensure that PSD Citywide completes the required work on time and on budget, we will gain clear input from stakeholders at kickoff to establish project scope and finalize the Implementation Project Plan. The assigned project manager will then follow this plan throughout the engagement while maintaining consistent contact with stakeholders to communicate the measured progress being made and to maintain full disclosure of any potential delays that would impact the timeline, should they arise, and recommend all subsequent efforts to ensure successful delivery within set timeframes.

Training

We will provide County staff with all the required training for this project. Citywide training can be customized within the constraint of the client budget provided as part of this proposal, and as a result, training descriptions and syllabi are unique and subject to change as County's needs are further identified throughout implementation. Training will be conducted online, or in-person at additional travel costs. Online training is recorded, and the County has access to it for future reference and onboarding. Additional training can be discussed further during contract negotiations.

Training Needs Assessments

Before training begins, our Training and Implementation Specialists will work with County to assess the current level of understanding within the County and identify specific training needs and requirements. Our team will then design and deliver training agendas and tailored learning materials so that they are in-line with the unique needs of County.

Train-the-Trainer Workshops

Once planning is complete, our Training and Implementation Specialists will host extensive hands-on training workshops with departmental designated Admin Users or Power Users, and identified end-users on all agreed-upon functions and applications of the system.

The extent and duration of training will vary depending on the requirements set out by the project, but typically includes administrator level functionality such as creating users, setting permissions and notifications, reporting, and other functionality that is crucial for County to maximize system effectiveness.

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We typically use a train-the-trainer approach so that client staff are trained as experts in the system. This approach typically results in greater knowledge-transfer and self-sufficiency within the client organization in the long term. Users will be fully capable of conducting their own end-user training and will therefore be able to scale the overall number of users of their new system over time, as more new end-users are added. However, we can also host training sessions with additional users if County prefers full user training over the train the trainer approach.

End User Training

End user training sessions are scheduled once our project team has determined that the software is configured, and admin users are already comfortable with the system. Multiple sessions can be scheduled in a day with any number of users in attendance. We will ensure the County's end users are comfortable with the system and are able to access all information and documentation required to fully use Citywide software. Role-based user training will focus on tasks related to the County's identified user roles.

Training and Testing Environment

All training sessions can use a test database replicating County's own software environment, using County's data. This approach maximizes training effectiveness as it allows users to match familiar data to software functions. The County will be provided with three databases as part of the implementation, so that data in the production environment can be replicated by the County within a devoted testing database without the need for PSD Citywide's intervention.

Training and Support Documentation

We will provide virtual (PDF/Word) copies of training documentation for each session. Our training support also provides online training videos and webinars for all Citywide software products. To ensure continued user support for the product, we will notify the County of any significant updates or new expansion modules to the system and make available online documentation and support after any major software updates or new expansion modules are released.

We also supply step-by-step user guides that are accessible from within the software. These guides contain thorough explanations and screen shots that provide an outline of all key end-user and administrative functions and processes in the software. Our user guides are continuously updated with future version releases, allowing users to refer to these guides for further information on the usage of the software tools after training has finished. All these resources are provided at no additional cost to the County and will be available once the Citywide software solution has been implemented and is accessible to staff.

All training will be customized based on County needs such as operations or maintenance staff training, or other department specific needs. During the project a Training Advisor will work with the County to determine the optimal approach for training Admins, SMEs, Trainers, and End-users. Training can be recorded and used for onboarding of new staff or recurrent training needs.

The table below illustrates our approach to Citywide system training. It is divided into individual sessions and will be customized depending on the County's needs. Classroom and session sizes depend entirely on client preferences and there are no limitations on the number of participants for each session. The County will need to account for employee training hours during these sessions.

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Training Session	Audience	Session Description and Objectives
Assets Session 1	Assets Admins & SMEs	The purpose of this training is to: • Introduce the Assets database • Review asset details including summary and valuation information • Understand how Classifications are used to structure and report on asset data • Sort, filter, and export data • Create a custom view of the inventory • Review asset details, flags, valuation/amortization information
Assets Session 2	Assets Admins & SMEs	The purpose of this training is to: • Introduce Asset Management tools • Learn why and how to use Asset Profiles which include Conditions, Risk, Events • Introduce lifecycle strategies • Introduce asset management reports • Make changes to Assets using the Default Values tool • Create and manage Asset Profiles • Set condition ranges and risk metrics • Add lifecycle events and create an asset management strategy • Manage Profiles at the asset level, update replacement cost, and add condition assessments
Maintenance Session 1	Maintenance Admins & SMEs	The purpose of this training is to: • Maintenance Basics - login, overview, navigation • Creating Service Requests & Work Orders for the Mobile App, GIS At the end of this training session participants will be able to: • Navigate & Use Citywide Maintenance • Create & edit Workflows for SRTs, WOTs, Custom Statuses and Notifications • Begin managing Resources including Equipment and Workers
Maintenance Session 2	Maintenance Admins & SMEs	The purpose of this training is to: • Workflow Control - User Defined Attributes, Notification Rules, Inspections/Processes • Will use selected client work scenarios to use during training - to be decided by the client
Citywide Core Administrator Training	Core Admins	The purpose of this training is to: • Create and edit Users, • Create and edit Roles & Permissions
Maintenance Schedules	Maintenance Admins and Managers	The purpose of this training is to:

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		• Learn Preventative & Schedule Maintenance Scheduling • Preventative Maintenance Approving • Asset Grouping & Schedule Reporting • Create & edit Maintenance Schedules • Manage Asset Groups • Manage Scheduled Events • Apply Usage to continue the cycle of maintenance
Citywide GIS Training	Maintenance Admins & SMEs	The purpose of this training session is to: • Learn to navigate and use Citywide's GIS system
Maintenance Reports Training	Maintenance Admins & SMEs	This session can be broken up into separate sessions depending on report needs. General Reports overview.
Work Orders Resource Costing	Admin	This session will show users how to use and configure Equipment, Labor, Vendor & Other Costing Depending on who performs these specific roles within the County, this session can be split into 2.
Citywide Mobile App	End Users	The purpose of this training session is to: • Learn to navigate & use Citywide Mobile App • Create, edit and complete daily Work Orders
Custom End User Training	End Users	The purpose of this training session is to: • Learn to navigate & use Citywide • Maintenance • Create, edit and complete daily Work Orders
API Training and Guidance	Integration Developers	PSD will provide a walk-through training session on the API and answer questions on which routes are required to accomplish integrations. This time does not include PSD configuring API routes.

Acceptance Test Plans

PSD Citywide has extensive Acceptance Test Plans for our Assets and Maintenance modules to ensure that our system meets specified requirements and is ready for deployment. These checklists will be refined and customized to meet the County's needs. PSD assigns priority levels to each test and has status updates so the client can see the progress.

The section below describes the overall approach used in performing various testing levels on the Citywide implementation project.

All the activities involved in testing are defined by these stages.

1. **TEST:** Run through the assigned use cases.
2. **REPORT:** Record results, Analyze the results, perform defect management, and report.
3. **TRACK:** Ensure to track results that require resolution/action.

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1. Test

The first step is the testing. Each User Acceptance Test (UAT) Tester will be provided Test Cases for them to perform. Each Test Case has a set of steps to follow in testing the configuration of the system and quality of the loaded asset data.

Test Cases

As seen in the figure below, each test case has a unique ID (e.g., PSD-001). This ID will be used to track results later.

Test Case PSD-001 - Access

Tester	All	Test Case ID	PSD-001
Test Case Title	Access	Functional Area	Access, Login and Help
Description of Scope	General Access to Citywide via Single Sign-in link, then access to help and support center.		

Sample Test Case Header

Testing Responsibilities

The Sample Test Case Header also indicates the tester(s) that are expected to perform the test case that aligns with their defined roles within the PSD Citywide application.

Name	Testing Responsibilities
TBD	UAT Tester • Test all test cases.
TBD	UAT Tester • Follow Test Plans in testing functionality & data
TBD	UAT Tester • Follow Test Plans in testing functionality & data
TBD	UAT Tester • Follow Test Plans in testing functionality & data

2.Record

The objective of this UAT testing is to confirm that the PSD Citywide Maintenance solution meets client requirements. In performing this test, it is important that the results are recorded. As the testing is being performed, each tester should have the testing results spreadsheet open for recorded results and comments.

The Results Spreadsheet includes the following columns for each Test Case:

- **Results:** The Pass/fail result of the test case. This column is to be used to indicate if all steps passed or what steps failed;
- **Comments:** In addition to the pass/fail, this column is used to record your questions, concerns and suggestions for improvements.

Note that all fails and comments should include the step they pertain to.

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3. Track

After completing the UAT testing and recording the Test Case Results in the spreadsheet, the project team will review the results together to identify the next steps. Results and comments will be prioritized in identifying further actions required in finalizing Release 1 of Citywide Maintenance. Below are two sample testing checklists illustrating our approach to acceptance testing for Citywide's Assets and Maintenance modules.

#	Acceptance Requirement	Critical Yes No	Completion Date	Tested By	Comments
Service Requests					
1	Request Types				
2	Attach an attribute to your new Service Request Type				
3	Attach a file to your new Service Request Type				
4	Add a Knowledgebase entry to your Service Request Type				
5	Linking a Service Request Type to a Work Order				
6	Create a Notification for your Service Request Type				
7	Requests				
8	Update your Service Request grid Columns and Create a Column Set for yourself				
9	Create a Service Request based on the new Service Request Type you setup				
10	Setup Your Dashboard Widgets under Home>MM>Dashboard				
11	Create and Save a Custom Service Request Report under Home>MM>Reports				
Work Orders					
1	Create a new Work Order Type under Home>MM>Work Flow>Work Order Types				
2	Attach an attribute to your new Work Order Type				
3	Attach a file to your new Work Order Type				
4	Attach a process to your new Work Order Type				
5	Create a Notification for your Work Order Type				
6	Update your Work Order Advanced Filter under Home>MM>Work Order				
7	Update your Work Order grid Columns and Create a Column Set for yourself				
8	Create a new Work Order based on the new Work Order Type you setup (Assign a Worker, Schedule dates/Target Dates)				
9	Setup Your Dashboard Widgets under Home>MM>Dashboard				
10	Create and Save a Custom Work Order Report under Home>MM>Reports				

Name:

Position:

Date:

I have reviewed the features and functions for the MM Implementation Project and agree that they are appropriate to my business area and attest that I was able to perform all my expected job function tasks and activities normally or have indicated all the issues preventing me from performing my duties as defects to be reviewed and resolved:

#	Acceptance Requirement	Completion Date	Tested By	Comments
1	Create a new Asset			
2	Sync asset attribute information via the Upload Centre			
3	Add a condition assessment to an asset			
4	Update an asset's replacement cost			
5	Confirm the attributes and attribute types via the "Attributes" section			
6	Confirm Asset listing for your subject area			
7	Confirm risk calculations via profiles for your subject area			
6	Confirm lifecycle strategies via profiles for your subject area			
7	Add a risk metric			
8	Add a lifecycle event			
9	Update a lifecycle strategy (change order of events, or remove events)			
10	Schedule a lifecycle event for an asset			
11	Run the Annual Requirement Report with and without lifecycle events			
12	Run the Operating/Capital & Growth Replacement Profile Reports with an inflation rate			
13	Run the Condition Report & Projected Condition Reports			
14	Run the Risk & Projected Risk Reports			
15	Run the Asset Averages Report			
17	Run the Asset Age Report			
16	View an asset's location via the GIS link			

Name:

Position:

Date:

I have reviewed the features and functions for the AM Implementation Project and agree that they are appropriate to my business area and attest that I was able to perform all my expected job function tasks and activities normally or have indicated all the issues preventing me from performing my duties as defects to be reviewed and resolved:

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Data Migration

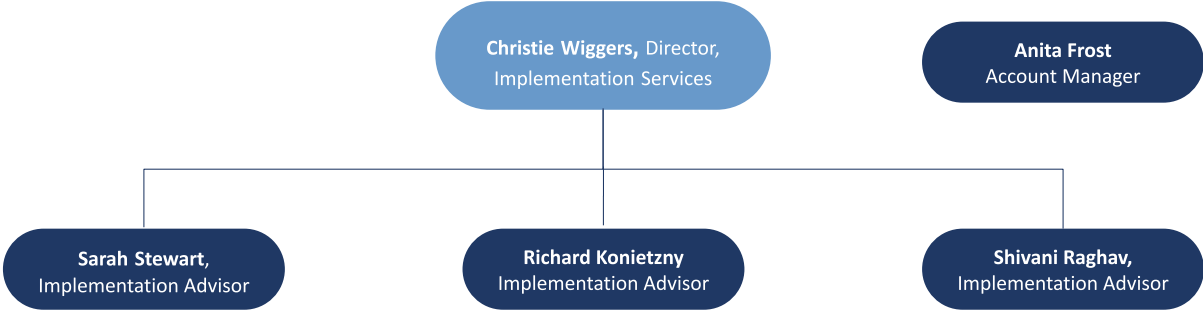
High quality data is the foundation of intelligent decision-making. To the greatest extent possible, PSD will assist the County with the migration of existing data into the required format for use in Citywide software. To perform the data migration, PSD will provide the County with data collection templates, which the County will fill with the data they wish to consolidate. This process will ensure that any new raw data the County wishes to incorporate can be captured at the time of data migration. The process will consist of cataloguing the necessary data to ensure everything is captured and then copying and pasting the needed information into the data collection template. PSD can also customize the data collection templates to include all existing categories currently in use by the County and ensure that data can be utilized in the new system.

Pre-Qualifications/Licensing/Disclosure Requirements

PSD meets all requirements set forth by the County in AGREEMENT TERMS AND CONDITIONS of this RFP. PSD will possess any and all permits, licenses, and professional credentials necessary to supply products, and the ability to deploy devices and perform services as specified under RFP #10936.

Key Staff, Project Experience & References

Organizational Chart



Project Team

The below project team will be assigned to complete the County’s Citywide software implementation. We are confident that this hand-picked team possesses the appropriate fit of knowledge, skills, and experience required for this undertaking. Our staff members are all remote-based throughout the province of Ontario, Canada.

Lead Project Manager – Primary Contact (Key Staff)	
	Christie Wiggers PMP Director of Implementation Services Qualifications: Christie is a Project Management Professional (PMP) through the Project Management Institute and has obtained her IAM Certificate from the Institute of Asset Management, Foundation Certificate in IT Service Management from itSMF Canada, and B.A., Social Science (Geography/GIS) from McMaster University. Christie possesses 16+ years of project management, GIS, EAMS, CMMS, and municipal infrastructure asset management experience in both the private and public sector. She has led 65+ similar EAM and CMMS implementation projects over the past 9+ years for public sector clients, including large and complex, multi-year, enterprise-wide engagements. Prior to joining PSD Citywide, Christie gained significant municipal experience working for the City of Hamilton, Ontario from 2002 to 2015. During her time with the City, Christie displayed consistent growth within the engineering and public works departments working as an Engineering Systems Technologist, a Project Manager – Infrastructure Systems (Public Works), and as an Asset Management Systems Analyst (Public Works). Among other duties and accomplishments, Christie was responsible for the analysis, design, implementation, and maintenance of Infrastructure Asset Management and GIS applications, including working with municipal stakeholders to define, analyze, and document workflows to implement and maintain the City’s Citywide Software Platform. Roles and Availability: As the Lead Project Manager, Christie will be responsible for leading her team of implementation analysts in setting up the Citywide CMMS for the County.
Assigned Project Team	

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Shivani Raghav, M.Eng. CEM | Implementation Analyst

Qualifications: Shivani is a transportation planner and engineer with 4 years' experience as a data analyst conducting quantitative assessments and research related to transportation systems, housing, demographics and the urban form. She has been with PSD since 2020 and has implemented dozens of similar systems throughout that time. She is proficient in collecting, managing, manipulating, and visualizing data for exploratory and statistical analyses with expertise in transportation planning, travel demand modelling, environmental assessments, feasibility, and impact studies.

Role & Availability: Shivani will be part of the implementation team and will be tasked with data management for the CMMS system. She will be tasked with integrating any new sets of data into the system.



Sarah Stewart | Implementation Advisor in Software Implementation (Key Staff)

Qualifications: Sarah has been with PSD since 2020 and has contributed to 50+ similar EAM client projects and personally trained 210+ users. Sarah possesses 12+ years of experience as a GIS Technician and Implementation/ Data Analyst in the public and private sectors and leverages considerable technical GIS knowledge a strong understanding of environmental science and computer science applications.

Role and Availability: Sarah will be part of the implementation team and will be tasked with data management for the CMMS system. She will be responsible for leading workshops and will ensure all new data sets are implemented correctly.



Richard Konietzny | Implementation Advisor (Key Staff)

Qualifications: Richard has over six years of experience manipulating client-supplied financial and infrastructure data within government organizations' proprietary databases and analytical modeling tools. Since joining PSD Citywide in 2016, Richard has completed over 100 similar software implementations of enterprise asset management systems. Richard has obtained his IAM Certificate from the Institute of Asset Management and his Business Accounting Diploma from Algonquin College, and is currently completing the Municipal Accounting and Finance Program through the Association of Municipal Clerks and Treasurers of Ontario (AMCTO).

Role and Availability: Richard will support the initial loading of the County supplied spreadsheets. Richard will work with PSD Citywide's assigned staff and the County to ensure maximum confidence in both the raw data itself, and in all final project components and deliverables that rely on that data by providing support throughout the collection, manipulation, and integration of the data throughout the project.

Technical Advisor to the Project



Name: Peter Scott, MBA, H.B.Sc, B.Sc, CSM | Chief Technology Officer

Qualifications: Peter possesses 18+ years of extensive, executive level experience with leading information and technology consulting organizations. He has a proven track record for bridging business needs by using technology solutions to deliver real, lasting results, and enjoys the challenges of leveraging data to improve the financial

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and operational performance of public sector clients. Peter leads the development and deployment of our Citywide software applications and related advisory services.

Peter has obtained his B.Sc. in Computer Science from Western University, his MBA and CMA from Queen's University, his IAM Certificate from the Institute of Asset Management, and his Certified Scrum Master (CSM) designation from Scrum Alliance. Peter is also a published expert on data analytics and business intelligence (BI) tools.

Role and Responsibilities: As principal advisor, Peter will act as a technical resource throughout the implementation, providing feedback and direction on relevant software integrations and customizations. As-needed, Peter will lead his team of developers in managing system testing and updates.



Anita Frost | Account Manager

Qualifications: Anita came to PSD Citywide with a wealth of regional development expertise in Southern California as well as federal defense contracting experience. As a proud graduate and former employee of San Diego State University, she was part of a campaign to fundraise for, plan and develop the Mission Valley Stadium and public river park. Anita has also worked for an international software company before PSD Citywide, implementing large scale systems for entities in the Public Sector as well as several Fortune 500 companies.

Roles and Responsibilities: Anita is assigned to the client as their Account Manager and will be the point of contact designated to discuss and/or negotiate elements contained within the response. Anita will continue to work with the client upon award of the contract to provide advice and oversight throughout each implementation and training engagement. Anita can also assist the client and PSD Citywide's assigned project manager to escalate and resolve any issues, if they arise.

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References

All project values represent original and final fee.

Cowichan Valley Regional District, British Columbia, Canada

Products and Services:	Citywide EAM, Includes Assets, Maintenance, Mobile App, API, and GIS Viewer with ESRI GIS Integration.
Project Duration:	2021 - 2023
Project Value:	\$310,000.00
Contact Name:	Neil Forrest, Asset Management Coordinator
Phone:	(250) 746-2500
Email:	neil.forrest@cvrld.bc.ca

Project Description:

In 2021, the Regional District conducted an RFP process to evaluate the marketplace for a single platform that would serve as a single source of asset truth for Finance, Asset Managers, and Maintenance and Operations. Ultimately, the Regional District selected PSD Citywide and began a multi-year, multi-phase project. The implementation consisted of the following phases:

Phase 1: Our team began implementing the asset registry. We established an integration with ESRI ArcGIS and enabled functionality for Decision Support and Mobile field apps. The Regional District has retained asset management inventories in excel including formalized hierarchies for many of their asset systems. During this phase, PSD Citywide are loading and configuring the asset hierarchies according to the available data hierarchies. A future phase will look to blend the financial asset registry and asset management registry into a single source of truth.

Phase 2: Our team implemented Citywide Maintenance (CMMS) with mobile functionality for Divisions over a phased approach. We started with the Water Management Division and then began implementing in the remaining Divisions for Facilities, Recycling and Waste Management, Parks, Trails, and Emergency Management. Throughout each of these phases, our implementation specialists finalized the requirements and design of the proposed approach, before gathering, formatting, and uploading all required work order data into the system. Specialists conducted workshops with Responsible Divisions to review existing operations & maintenance processes and made recommendations to enable the CVRD to better utilize the system.

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Municipality of Port Hope, Ontario, Canada



Products and Services:	Project 1 – Assets, Maintenance with GIS Viewer, Capital Planning, Budgeting, Permitting Project 2 – Maintenance Updates – Advanced Route Patrol, Single Sign-On, Asset Collector
Project Duration:	Project 1- 2019 - 2020 Project 2 – 2022 - 2023 (7 months)
Project Value:	Project 1 - \$217,300 Project 2- \$73,390
Contact Name and Title:	David Baxter, Director of Finance
Phone:	(905) 885-4544 Ext. 2223
Email:	dbaxter@porthope.ca

Project Description:

In 2018, the Municipality of Port Hope issued an RFP to secure a fully integrated Enterprise Asset Management Software Solution that included modules for asset management, GIS, work order management, and budgeting. The modules were required to operate together as one single cohesive system to automate existing processes, save time, and support users in analyzing capital asset data and budgeting. The Municipality of Port Hope selected PSD Citywide in January 2019 as the vendor of choice to implement our proposed suite of software systems – Citywide Assets with GIS, Citywide Maintenance, Citywide Permits, Citywide Capital Planning & Analysis (CPA).

The Assets module and data migration process together served as the cornerstone of this implementation, resulting in an updated and dynamically linked asset inventory within Citywide Assets. The data migration process involved datasets from multiple departments, including the finance, public works, and water departments. GIS data was also central to ensuring proper connectivity and integration between Assets, GIS, and Maintenance modules, and was derived from an extensive GIS Data Gap Analysis to determine completeness and usability of the data. The result was more accurate financial reporting and better enterprise-wide use of the software.

The Maintenance module was next to be implemented as the Municipality's new service request, work order, and maintenance management solution. The module was implemented for the Roads, Water, and Parks and Recreation departments in a phased approach. A significant undertaking involved the transfer of assets, processes, and preventative maintenance schedules from a legacy system (Infor) for the Water department. This allowed historical asset information to be available within Citywide while also allowing for processes and schedules to be configured within the Maintenance module so staff could continue with preventative maintenance activities against assets located within Water operations. In addition, providing staff the ability to complete work orders via a mobile app significantly modernized the operation and maintenance of key assets specifically for Roads and Parks/Recreation departments moving forward.

In 2022, Port Hope began a project of updating their Maintenance module. As a result of this project, the Town of Port Hope has successfully added advanced route patrol, single sign on, asset collector

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and multiple other smaller improvements to their current Maintenance configuration (such as status updates, processes, notifications).

Township of Clearview, Ontario, Canada

Products and Services:	Citywide Assets, Maintenance, GIS Viewer
Project Duration:	September 2011, August 2018, December 2019
Project Value:	\$46,472
Contact Name and Title:	Stephanie Schell, Compliance/QMS Coordinator
Phone:	(705)-428-6230 x 306
Email:	sschell@clearview.ca

Project Description:

In September 2011, the Township of Clearview implemented Citywide Assets to house their asset registry for financial reporting purposes and to satisfy PSAB 3150 requirements. Clearview now uses the system to track condition assessments, risk modeling and lifecycle activities.

To enhance their asset management practices, Clearview added the Citywide Maintenance module in 2018 to implement their Water and Sewer assets to their Water and Wastewater departments. The Township uses Citywide Maintenance to create preventative maintenance schedules for their assets and to generate data-rich reports on service requests and work orders. Part of this implementation included adding the service requests and resource costing for their equipment, materials and workers. Our team created and configured a significant number of items to represent current operations including 30+ service requests and 550+ work order types as well as 360+ preventative maintenance schedules for their water and wastewater division. The Township has 280+ service requests and 270+ work orders in the system since they went live.

Finally, in 2019, Clearview implemented Citywide GIS Viewer to allow the Township to visualize and directly access all the asset information stored within their asset register via a versatile mapping solution, which enhances their infrastructure planning capabilities and enables superior communication around asset management.

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Township of Springwater, Ontario, Canada



Project Duration	Project 1 - October 2019 – May 2020 Project 2 – October 2021- April 2023
Products and Services	Project 1- Citywide Assets, GIS, Maintenance, Capital Planning and Analysis Software Project 2 – Advanced Route Patrol and Asset Collector
Project Budget	Project 1 - \$172,190.00 Project 2 - \$76,700.00
Contact Name and Title	Brooklyn Paolucci, Asset Management Coordinator
Phone	(705) 728-4784
Email	brooklynn.paolucci@springwater.ca

Project 1 Description:

The Township selected PSD Citywide in October 2019 to implement the Citywide Enterprise Asset Management System (EAMS), including the Assets, GIS Viewer, CPA, and Maintenance modules to improve asset management capacity.

Springwater implemented Citywide Maintenance to be a service request, work order, and asset management solution. The system has allowed the Township to prioritize, schedule, and track service requests, events, and projects. Citywide Maintenance was implemented in two phases for the following departments: Parks & Recreation, Facilities, and Public Works. The first phase implemented Service Requests and Work Orders and included integration with ESRI GIS. The second phase implementation of Maintenance provided the Township's Parks & Facilities and Public Works departments with the following tools: preventative maintenance and inspections, route patrol, and resource costing. The mobile and web app – populated with cloud-based data – facilitate use while working from the office, remotely, or in the field. The Township now can efficiently manage all service requests and work orders while also planning for and pre-arranging maintenance and inspections. The tool allows administrators to view reports and calculate resource use, allowing easier identification of areas of improvement and the associated costs. Since the software went live in January of 2020, over 320 service requests and more than 2000 work orders have been processed in the system.

The GIS Viewer serves as a repository for spatial data that is served up to an associated web-based viewer. We integrated the new asset management and maintenance management tools with Citywide GIS Viewer and performed custom integrations with WinFuel – the Township's existing fuel and fluid management software.

The Township has highlighted the benefits of utilizing a web-based program during the COVID 19 pandemic. Remote maintenance management was made possible with a web-based program. Moreover, the Township purchased 17 new android tablets to enable complete mobile usage of the software by the public works and parks & facilities staff in the field. All service requests and work orders are sent through the system and municipal staff members use the tablets to receive the work orders, make important notes, add photos, and mark when the work order is complete.

The Township uses Citywide Assets to act as an asset register and to create accurate financial reporting and other asset management functions, such as lifecycle planning, risk modelling, and levels

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of service. During the implementation, we conducted a thorough gap analysis to identify any missing data or errors in the Township's existing asset data sets. Our team also helped the Township create a custom classification structure for the asset inventory, build an amortization schedule, and ensure that the asset data balanced to the audited financial statements. With one master asset inventory, accessible via an enterprise web-based solution, all Springwater staff could now conduct long-term planning and make key infrastructure investment decisions using the same up-to-date and comprehensive asset data. Citywide CPA is used to develop data-driven long-term financial plans based on multiple funding scenarios and prioritize projects based on lifecycle events, risk and condition.

Project 2 Description:

Springwater successfully completed Maintenance improvements including Citywide Route Patrol Advance Functionality & Asset Collector. Improvements include GIS layer integrations, patrol schedule compliance mapping, asset compliance indicators, pre-defined patrol routes and scheduling, running deficiency reports and patrol history reports and training provided.

Approximately 100 Route Patrols were created using full functionality since the improvements were implemented. Citizen Request Portal analysis, configuration and training were also provided as well as training to include Core Admin Training, MM Admin Training, Resource Costing Training and Maintenance Reports Training.

County of Wellington, ON

Project Duration	April 2020 – June 2021
Products and Services	Assets, Maintenance, GIS Viewer, Route Patrol
Project Value	\$208,100.00
Contact Name and Title	Andrea Brossault, Asset Management Coordinator
Phone	519-837-2600 x 2291
Email	andreab@wellington.ca

Project Description:

Our team implemented the Citywide Assets and Maintenance modules for the County. The County's goal was to establish a complete asset registry for all asset types and to support the County with its asset management reporting to assist with O. Reg. 588/17 and TCA financial reporting compliance and requirements.

In April 2020, we implemented Citywide Assets with GIS Viewer functionality for the County. Our implementation specialists followed PSD Citywide's implementation methodology, involving project initiation efforts, migration of data into the solution, system configuration, staff training, and support during go-live. The Assets module allows for advanced analysis and easy reporting, in which users within the County can create asset profiles for similar asset types, then easily generate detailed lifecycle strategies, risk matrices, and condition reports within the application. The GIS Viewer serves as a repository for spatial data that is served up to an associated web-based viewer.

In May 2020, the County began implementing Citywide Maintenance to enable the County to prioritize, schedule, and track service requests, events, and projects. This project is being completed over 2 phases focusing on different departments.

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Phase 1 was completed from May 2020 to January 2021 and involved implementing Citywide Maintenance and related service request, work orders, and preventative maintenance functionality for the County's Roads, Social Housing, Fleet and Facilities departments. The scope of work included a full implementation of the software with the upload of the County's existing data, the full training of Admin Users, and testing and go-live services. The County of Wellington also downloaded the Mobile App, which allows County users to access their work orders in the field and prioritize/update their activities in real time. Our team followed the "Train the Trainer" approach so that administrative staff were trained and comfortable with system functionality to the level where they can conduct in-house end user training with additional users.

Phase 2 has recently concluded additional departments and involves the implementation of parts and materials inventory management features, further report building within the system, the activation and implementation of Route Patrol functionality, the establishment of Preventative Maintenance features for Fleet, and the implementation and integration of the Citizen Request Portal for Roads.

The County also completed the basic implementation and set up for Route Patrol. PSD Citywide set up their routes and deficiencies to get patrollers familiar with the system. The County started to implement some of the advanced features of the route patrol internally made possible because all users were trained and confident on system configuration and how to implement it using internal staff. They have completed linking routes to their assets and linking it all to their GIS. The County has patrollers on the road patrolling their defined routes and collecting deficiencies.

Our implementation specialists were attentive to the County of Wellington's additional customization requests. We successfully integrated the system with their ESRI system. The County also activated Citywide API so they can share, and update data and the execution of business transactions done in third party applications.

Technical Aspects of Proposal

PSD confirms that all details of this proposal include all elements necessary to complete the services requested by the County.

Anita Frost – Account Manager

Environmentally Friendly Practices

PSD Citywide Inc. is committed to creating long-term value through sustainable practices. Being a leader in the software and technology industry, we also believe in proper disposal of electronics and have a company program to ensure staff do so. Since the beginning of the Covid pandemic we have been a remote first company that is committed to minimizing our environmental impact. Our offices use less energy because of our more work-at-home friendly policies. We encourage our employees to participate in “green” initiatives through our Outreach Committee such as “Earth Day.” PSD Citywide Inc. is continuously finding ways to reduce our carbon footprint to ensure that we minimize our environmental impact.

Citywide Assets was designed to help municipalities with efficient resource and asset management through understanding the state of their infrastructure. Citywide makes it easy for the County to proactively identify and meet opportunities for efficient resource use and reducing GHG emissions by prolonging asset lifespan. Having the ability to house all asset information in one place and run reports on asset lifecycle and risk will be pivotal for more impactful reporting to council and public that will inform budgeting and maintenance decisions as well as highlight areas for environmental improvement.

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Pricing

The County can find PSD's pricing included in a separate marked envelope.

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Statement to Service Entire County

PSD's software can be implemented and maintained remotely and therefore PSD is committed to serving all of the County's desired locations including, but not limited to: Pajaro, Castroville, Royal Oaks, Salinas, Monterey, Carmel Valley, Marina, Seaside, Prunedale, Aromas, Soledad, King City, San Lucas, San Ardo, Bradley and past the San Luis Obispo County border.

Local Business Declaration Form

PSD Citywide (US) Inc. is not a local vendor.

Exceptions

No exceptions have been noted.

Appendix I – Functional and Technical Requirements

Req. No.	Requirement Description	Supported	Comments
General System Requirements			
GS-01	To be hosted in a government cloud environment and supports the use of SSL (HTTPS) for security	S	
GS-02	SaaS (Software as a Service) in a government cloud	S	
GS-03	Must support single sign-on, multi-factor authentication.	S	
GS-04	Supports a multi-user environment and provides data locking or buffering routines to prevent loss of information by simultaneous updates	S	
GS-05	System provides application, file, and record level security.	S	
GS-06	Seamless synchronization between tablets, phones, web application and database	S	
GS-07	System must be compatible with modern browsers such as Google Chrome, Microsoft Edge, Safari	S	
GS-08	Ability to define and re-arrange the system menus.	S	
GS-09	Ability to define any field in the system as required.	S	
GS-10	Ability to create dashboards, KPIs (key performance indicators), and "Inbox" functionality for user interface with links to critical information for each user.	S	
GS-11	System Administrators have the ability to easily create user defined fields and easily modify the configuration.	S	
GS-12	Allows adjustments to forms with tables/list boxes (i.e., increase the number of rows displayed), based upon user preferences; without changing screens universally	S	
GS-13	Business Intelligence metrics and graphs to monitor trends	S	

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GS-14	User can customize their own dashboard.	S	
GS-15	Dashboard designed for functional roles including Maintenance, Supervisor, Managers, Asset Managers, Parts Manager, Customer Service and Administrator	S	
GS-16	Internal service/work request feature to request work.	S	
GS-17	Public/External service/work request feature to request work.	S	
GS-18	Look up assets or locations by: equipment/location numbers, address, address range, intersection, or polygon coverage, asset class or name, general query.	S	
GS-19	Example KPIs include:	S	
	-Mean time to repair (by work order type)	S	
	-Mean time to respond (by work order type)	S	
	-Schedule Compliance	S	
	-PM Compliance	S	
	-Work Order Backlog	S	
	-Service/Work Request Backlog	S	
GS-20	Performance dials, charts, and tables that present Key Performance Indicators (KPIs) or metrics	S	
GS-21	Query and view work orders on the map. (color-coded based on work order status)	S	
GS-22	User-defined fields are searchable and reportable.	S	
Security & Other Requirements			
SO-01	Provide the ability to administer user accounts and system permissions.	S	

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SO-02	System Administration is able to create and change system logins (usernames) and passwords.	S	
SO-03	Monitor system usage (see who is logged on) and terminate sessions.	S	
SO-04	Set a time period of user inactivity after which a user will be automatically logged out of the system.	S	
SO-05	The system assigns role-based security and user-based security	S	
SO-06	Encryption traffic both in transit and at rest (SHA 512 preferred)	S	
SO-07	Provide SOC 2 report indicating regular patches and security issues addressed in timely manner.	S	
SO-08	SSO SAML - to be configurable on email or upn	S	
SO-09	Time constraint, limited access for contractor access (2-weeks) and they only have access to their work order(s).	C	Only access to their own work is standard. There is no automatic time constraint however access can be modified as required.
SO-10	Application/system log to keep activity for past 90 days	S	
Reporting			
RP-01	Reports allow drill-down capabilities (where applicable).	S	
RP-02	What is your report writing tool?	S	We have an embedded report builder that provides robust functionality for creating reports with user/dept defined formats. We also provide tools to connect Citywide with modern business intelligence tools.
RP-03	Ability to establish scheduled reports in the system.	S	
RP-04	Ability to email system reports at runtime or on a regular schedule.	S	
RP-05	Ability to save / export reports to .pdf, .xls, .csv.	S	
RP-06	Ability to create and save custom reports.	S	
RP-07	Ability to print reports.	S	
RP-08	Ability to modify standard system reports.	S	

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RP-09	System should provide the ability to create standard and ad-hoc or customizable reports such as:	S	
	-Inventory reports	S	
	-Condition assessment reports	S	
	-Asset remaining life reports	S	
	-Repair/replacement reports	S	
	-Performance reports (Service level reports, benchmarks)	S	
	-Site Inspection Reports	S	
	-Work Order Summaries (open, closed, pending, costs, etc.)	S	
RP-10	Generates productivity and cost analysis reports by task, period, job, location, and crew	S	
RP-11	Makes all data elements available for inquiry and report through the report writing function, including user-defined fields	S	
RP-12	The ad hoc reporting module provides the user the ability to select query options from one or more database tables	S	
RP-13	Ability to create, save, and edit queries.	S	
RP-14	Querying can be performed through the CMMS and displayed on the GIS. Queries may include service / work requests, work orders, preventive maintenance, and asset condition index.	S	We will create a standard integration that allows users to view this information, and more, on our GIS viewer. Our field mapper can also support additional customization by the County.
RP-15	Generates user-defined form letters (i.e., notification letters to customers as to the status of complaint processing)	S	
RP-16	Asset reports that present maintenance and reliability benchmarking data that provide feedback on maintenance improvement opportunities.	S	
Materials Management			

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MM-01	Ability to add inventory and non-inventory materials to work orders.	S	
MM-02	Ability to have different costs, re-order quantities, safety stock levels, min/max levels, and vendors for the same inventory item at different warehouse locations.	S	
MM-03	Provide an easy method for determining the quantities available and quantities reserved.	S	
MM-04	Allow viewing of item levels at other warehouses, but security prevents modifications of data (unless appropriate security rights are granted).	S	
MM-05	Ability to group or "kit" individual inventory items that typically get issued together. Assign an inventory item to the "kit" and issue the kit instead of the individual items.	C	Users could issue parts out to remove from inventory and then bring in a "Kit" with new cost and bin location information.
MM-06	Automatic notification/flag if issue results in a negative balance.	N	We have a min/max so that staff can see when parts fall below a minimum level. By definition negative balance means you do not have inventory so you would not issue parts. If there was a part discovered that is not listed in the inventory, there is purpose built functionality for the user to bring that inventory into the system and issue it to a work order.
MM-07	Ability to return an item to stock and credit the work order that it was originally issued to.	S	
MM-08	Ability to view then select and issue the spare parts for a specific asset/equipment item.	S	
MM-09	Issue inventory items to a work order, asset, location, or GL account number.	S	
MM-10	Standard inventory reports. (notification of pre-order?)	S	
MM-11	Values inventory using Last In First Out (LIFO)	S	
MM-12	Ability to link vendors to parts inventory. Capable of storing custom vendor equipment numbers, and manufacturer numbers.	S	
MM-13	Ability to organize inventory by locations and sublocations.	S	

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MM-14	Ability to organize inventory by categories and subcategories.	S	
MM-15	Ability to generate a report for current inventory items that includes a count for each location and each warehouse.	S	
MM-16	Ability to track inventory in different units.	S	
MM-17	Ability to transfer parts inventory to different locations.	S	
MM-18	Ability to batch updates to inventory quantities from cycle counting.		Ask Christie.
MM-19	Automated notification of need for pre-order of materials based on upcoming work vs. current inventory.	C	This is report driven at the moment. Staff can use a work order status of "waiting on inventory" to notify the need to order inventory.
MM-20	Use of QR codes to check out inventory, tools, and heavy equipment to add to work orders.	S	
MM-21	Allows materials and equipment to be checked in and out to employees.	S	
Integration			
IR-01	The data structure should allow integration with other systems with open databases.	S	
IR-02	Uses a set of Application Programming Interfaces (APIs) to create interfaces to other applications	S	
IR-03	Integration with Esri GIS software v 10.9.1 or higher.	S	
	For the following list of integrations, please refer to the detailed 'push/pull factors' listed in the RFP		
IR-04	Integration with Oracle Fusion Cloud HCM	M	API Library has available end points to support requested integration
IR-05	Integration with WinCAMS	M	API Library has available end points to support requested integration
IR-06	Integration with StreetSaver	S	Excel upload tools support mass data sync of new data from Streetsaver
IR-07	Integration with MC uConnect Mobile App	M	API Library has available end points to support requested integration
IR-08	Integration with Outer Spatial	M	API Library has available end points to support requested integration

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IR-09	Integration with eCMS	M	API Library has available end points to support requested integration
IR-10	Potential Future integration with 2NForm	M	API Library has available end points to support requested integration
IR-11	Able to generate and export data in multiple formats (SQL, MS Excel, pdf, html, comma delimited, fixed width, etc.)	S	
IR-12	Seamlessly interfaces with Office 365, including Outlook and MS Teams	S	Emails automated from Citywide
Work Order Management			
WM-01	Ability to quickly create a service/work request and easily check on the status of the request.	S	
WM-02	Able to generate a work order without a service/work request.	S	
WM-03	Ability to assign priorities to service/work request and work orders. (i.e., low, medium, high, emergency)	S	
WM-04	Ability to define task-specific steps/procedures such as Maintenance Action Procedures (MAPs) / job plans for completing work.	S	
WM-05	Ability to record labor, materials, and equipment (miles/hours) used on work order.	S	
WM-06	Ability to associate the following information with work order labor entries: - asset(s), activity code, project #	S	
WM-07	Ability to attach photos/videos to work orders.	S	
WM-08	Ability to record equipment measurements, i.e., meter readings, temperature on work order.	S	
WM-09	Ability to view previous measurement readings.	S	
WM-10	Ability to view and interact with the map.	S	
WM-11	Ability to track problems, causes, and corrective actions (failure codes) on work orders.	S	
WM-12	Ability to associate a work order with multiple assets and distribute work order costs to all associated assets.	S	

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WM-13	Ability to view work instructions / job plans.	S	
WM-14	Ability to view safety information.	S	
WM-15	Ability to integrate safety information such as MSDS (material safety data sheet), confined space entry permits, lock out/tag out, etc.	S	
WM-16	Alert users on work order if asset is covered under warranty.	C	Tracking warranty is standard but this is not an alert.
WM-17	Ability to limit information that can be edited on a work order based on the status.	S	
WM-18	Can add an address to work order.	S	
WM-19	Can add asset(s) from an asset hierarchy to work order.	S	
WM-20	A single work order can include multiple tasks / checklists.	S	
WM-21	Checklist items / tasks can be checked off individually when completed on the work order.	S	
WM-22	Work orders can track job costing including labor, equipment, contractor, parts, and miscellaneous costs.	S	
WM-23	A work order can have user-defined statuses (i.e., new, open, hold, cancel, complete, close).	S	
WM-24	Allows work order to be assigned to a specific project.	S	
WM-25	Ability to create new work orders or follow-up work orders in the field in connected and in disconnected mode.	S	
WM-26	Allows work orders to be created from a predefined work order template or save as an existing work order.	S	
WM-27	Ability to plan/estimate the labor, materials, and equipment required for a work order.	S	
WM-28	Automatically transfer estimated labor, equipment and contractor hours to actual hours when work orders are closed. Must have a way to differentiate between estimated and actual.	S	

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WM-29	Ability to perform labor resource scheduling at the department level for department resources and at the group level for groups that provide services to multiple departments.	S	
WM-30	Ability to create workload projections.	S	
WM-31	Ability to schedule at the employee level and to perform resource leveling.	S	
WM-32	Ability to view workload on a calendar and have easy to use drag and drop capabilities to distribute workload.	S	
WM-33	Ability to view materials/parts lists.	S	
WM-34	Ability to track planned/estimated costs vs. actual costs for work orders.	S	
WM-35	Ability to easily close a work order by completing information on a single screen.	S	
WM-36	Ability to adjust closed work orders, for users with appropriate security rights.	S	
WM-37	Automatically close the associated service/work request when the work order is closed.	S	
WM-38	Ability to cancel a work order without losing original request.	S	
WM-39	Ability to send notifications to original requestor when work order is closed.	S	
WM-40	Ability to view work history by location.	S	
WM-41	Provide easy access to maintenance history for assets.	S	
WM-42	Provide historical maintenance information to support budget process including repair vs. replace decisions.	S	
WM-43	Ability to track status of a work order and easily review a history of status changes displaying to and from status, date and time of change, user who performed change, and comments.	S	
WM-44	Ability to easily view, report, and manage overdue work orders or a work order backlog.	S	

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WM-45	Easily check availability of parts from a work order.	S	
WM-46	Ability to track asset downtime and cause.	S	
WM-47	Allow access for outside contractors to receive and complete work orders and upload attachments, i.e., invoices.	S	
WM-48	Allows the user to select a group of work orders and perform certain batch function/ mass edit (i.e., print, open, close, assign, prioritize).	S	
WM-49	Allows unique user defined fields for different work order tasks - specific to a work order template.	S	
Asset Management			
AM-01	Tracks asset purchase cost, asset replacement value and depreciated costs.	S	
AM-02	Automatically inflate the asset replacement value annually by classes or globally.	S	
AM-03	Generate book value and depreciated cost to comply with GASB 34 reporting requirements.	S	
AM-04	Tracks purchase and installation dates.	S	
AM-05	Tracks Asset Impact Index (consequence of failure).	S	
AM-06	Tracks Asset Probability Index (probability of failure).	S	
AM-07	Tracks Asset Condition Index (condition of assets).	S	
AM-08	Tracks asset useful life and remaining useful life.	S	
AM-09	Shows GIS attributes on the asset inventory.	S	
AM-10	Allows unique asset attributes for each asset class.	S	
AM-11	Allows for asset cloning to quickly generate multiple new assets.	S	
AM-12	Establishes asset inventory in a hierarchy format that can include locations, sub locations, classes, subclasses, parent assets and child assets.	S	

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AM-13	Assets can be dragged and dropped to different locations and classes on the asset hierarchy.	N	We have found a drag and drop can lead to accidental mistakes on asset hierarchy. We have built a simple pop up that allows staff to modify the hierarchy.
AM-14	Assets can be viewed on a list view or map view.	S	
AM-15	Allows users to search asset records by ID, name, description, or address.	S	
AM-16	Allows users to sort, filter and search fields in a table format.	S	
AM-17	Shows any current and upcoming activities (i.e., work orders, preventive maintenance, condition assessment and inspection) related to the asset.	S	
AM-18	Tracks asset meter readings (i.e., odometer, run times, temperature, alarms)	S	
AM-19	Ability to track warranties for assets.	S	
AM-20	Ability to establish a priority or criticality code for each asset and have the priority carry over to the work order.	S	
AM-21	Easy (or automatic) process for adding new assets. When new assets are created in GIS, it should be automatic to sync the new data to the CMMS.	S	
AM-22	Allow the addition of new non-GIS assets in an easy, straight-forward process.	S	
AM-23	Ability to associate inventory items (create spare parts lists) for assets.	S	
AM-24	Ability to define an asset as a rotatable spare or serialized asset. Track maintenance history with rotatable spares. Track assets as equipment items when installed, and as inventory items when in the storerooms.	N	
AM-25	Track original purchase price and replacement costs for assets.	S	
AM-26	Ability to link or attach related documents, pictures, etc. to assets.	S	
AM-27	System should allow tracking of assets from acquisition to disposal.	S	
AM-28	Ability to create asset and location hierarchies (parent/child relationships).	S	

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AM-29	Ability to roll up maintenance cost to any level in a hierarchy.	S	
AM-30	Provide graphical (tree structure) navigation of asset and location hierarchies. Allow the user to navigate through a location hierarchy to find equipment at a specific location.	S	
AM-31	Ability to retire an asset without losing historical data.	S	
AM-32	Ability to track the status of an asset, i.e., Out of Service, Operating, Emergency Use Only, etc.	S	
AM-33	Ability to move assets between locations and track complete move history for each asset. (If a motor is moved to a different pump)	S	
AM-34	Ability to track asset manufacturers' and vendors' name, address, phone, fax, and web page, as well as multiple contacts for each.	S	
AM-35	Provide data for life cycle cost analysis and repair vs. replace decisions.	S	
AM-36	The system should track connections posing a risk of backflow, manage installed backflow prevention devices, and track/enforce compliance.	S	
AM-37	Ability to easily view total material, labor, outside services, and tool costs for maintaining asset.	S	
AM-38	Ability to identify critical services and associated critical customers.	S	
Mobile			
MO-01	Ability to run the application on a variety of mobile devices. Please identify supported platforms.	S	Citywide Mobile works on any Android or iOS supported devices.
MO-02	Mobile solution must include asset inventory, map view, work order, service/work request, warehouse, and inspection capabilities.	S	
MO-03	Ability to use multiple communication methods to synchronize the mobile device. If the device is offline, it must sync when a connection is re-established. Auto-resync.	S	

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MO-04	Ability to configure the mobile solution to hide un-needed fields/ functions based on user ID/role.	S	
MO-05	The system should have intuitive design of screens / menu / functions (thus enable end users to learn mobile solution without extensive training).	S	
MO-06	Ability to view safety information.	S	
MO-07	Ability to record labor, material, and equipment to work orders.	S	
MO-08	Ability to attach photos/videos to work orders directly from camera.	S	
MO-09	Ability to record equipment measurements, i.e., meter readings.	S	
MO-10	Ability to view previous measurement readings.	S	
MO-11	Mobile solution allows access to assets and attributes via the map.	S	
MO-12	Mobile solution uses location services on mobile devices to show current location on map.	S	
MO-13	Mobile solution has the ability to create, update, and complete service/work requests and work orders.	S	
MO-14	Mobile solution can route work orders.	S	
MO-15	Mobile solution has notification services to inform users of updates and assignments of new service/work requests and work orders.	S	
MO-16	Mobile solution can show service/work requests and work orders on list or map view.	S	
MO-17	Mobile solution provides ability to view electronic documents attached to assets, work orders, or service/work requests.	S	
MO-18	Mobile solution allows users to retrieve historical work orders, and inspections for assets.	S	
MO-19	Mobile solution uses the mobile device's built-in camera to scan barcodes or QR codes to pull up records and create work orders.	S	

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MO-20	Mobile solution allows warehouse management.	S	
GIS			
GS-1	Main interface contains direct access to the GIS data via a map service published by ArcGIS for Server.	S	
GS-2	Ability to select an asset(s) on the map and create a work activity against that asset.	S	
GS-3	Allows users to enter an address or select an asset and identify all the assets within a user-defined buffer distance.	S	
GS-4	Provides the ability to search for assets by one or more GIS attributes.	S	
GS-5	Allows selected users based on role/permissions to update GIS attributes.	S	
GS-6	Field users can write GIS changes to a redline layer for GIS Admin acceptance.	C	This is dependant on how the County wants to manage its Citywide vs GIS data. Some clients have Citywide as the source of truth and push changes to GIS, while others have data flow the opposite way. We can support either configuration.
GS-7	Displays the location of service/work requests, work orders, and inspections on the map.	S	
GS-8	Ability to easily view asset/location attribute information on a map.	S	
GS-9	Ability to easily view work order information (WO #, description, status, etc.) from the map.	S	
GS-10	Allows users to change between List View and Map View to view the details of the asset(s).	S	
GS-11	Ability to display assets that meets user-defined query criteria on the map.	S	
GS-12	Ability to generate a list/report of assets/locations from a map (e.g., get a list of all assets in the viewable region of a map).	S	
GS-13	Allows users to generate a GIS query by color coding all the assets related to specific user-defined parameters (i.e., work order types, tasks, supervisors, lead, causes)	S	

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GS-14	Allows users to view attachments (i.e., videos, photos, documents) to the assets directly from the map.	S	Click on the asset takes you to the asset page with documents.
GS-15	Allows GIS layers to be turned on and off as needed by user preferences.	S	
GS-16	Ability to search GIS attributes from within the CMMS.	S	
GS-17	Ability to assign work orders to individuals and/or work crews from the map.	S	
Preventive Maintenance			
PM-01	Ability to establish PMs based on meters (run-time), mileage, or calendar-based (by multiples of year, month, week, or day).	S	
PM-02	The system can create a PM for a group of assets by selecting the assets from the map.	S	
PM-03	The system will auto-generate group PM work orders by schedule or meter readings.	S	
PM-04	The system can integrate with SCADA to trigger PM activities based on run times to take precedence over time-based PMs.	C	See API documentation.
PM-05	The system allows seasonal PMs for specific months of the year.	S	
PM-06	The system allows multiple schedules (i.e., annual, quarterly, monthly) in one PM that allows users to prioritize and eliminate duplicate PMs.	S	
PM-07	The system allows multiple schedules with unique checklists associated to different schedules in the PM.	S	
PM-08	The system can generate dashboard, email, text message, or pop-up notifications to alert users that PMs are due.	S	
PM-09	Easily identify delinquent PM work.	S	
PM-10	The system allows for customization of the PM work order format.	S	
PM-11	The system can allow for detailed PM procedures (SOPs) to accompany each different PM or PM schedule.	S	
PM-12	The system will forecast and display the PM in a calendar view by day, week, and	S	

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	month with the option to group by department and WO type.		
PM-13	The system allows PM templates to be created which can be used for immediate, on-demand or automatic scheduling.	S	
PM-14	Ability to create corrective work orders from a PM work order without re-entering data.	S	
PM-15	Ability to create PMs prior to the date they are due based on a user specified lead time (7 days, 1 day, now).	S	
PM-16	Ability to identify the overlap and improve the coordination of corrective and PM work. For example, a corrective work order includes some tasks that are normally performed on a scheduled PM.	S	
PM-17	Ability to not generate PMs for equipment in certain statuses (e.g., out-of-service).	S	
PM-18	Ability to add estimated labor, material, and equipment requirements on a PM.	S	
PM-19	Ability to forecast the parts and labor required for the coming year based on the PM schedule established in the system for each piece of equipment for budgeting purposes.	S	
PM-20	Ability to release and track PMs for outside contractors.	S	
Advanced Asset Management			
Condition Assessment			
CA-01	Allows users to create condition assessment templates for each class of asset.	S	
CA-02	Allows variables in the condition assessment templates to be weighted based on criticality.	S	
CA-03	Allows users to select a condition assessment rating (1-5) for each variable.	S	
CA-04	Automatically calculates an Asset Condition Index	S	
CA-05	The Asset Condition Index will be used to calculate the probability of failure of the asset and modify remaining useful life	S	County decides what data points contribute to probability of failure as this could also be maintenance history.

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CA-06	Allows users to add photos, videos and reports related to the condition assessment.	S	
CA-07	Ability to read CCTV software condition assessment records (PACP scores).	C	Staff would need to apply CCTV to appropriate assets.
CA-08	Presents the condition assessments in list or map view.	S	
Asset Lifecycle Planning			
CA-09	Allows users to create lifecycle plans for different asset classes.	S	
CA-10	Asset plans include Capital Expenditures (CAPEX) and Operating Expenditures (OPEX).	S	
CA-11	Maintenance, rehabilitation, and replacement activity expenditures are tracked as a percentage of asset replacement value.	S	
CA-12	Presents asset lifecycle plan and useful life graph.	S	
CA-13	Asset plans include user-defined useful life and financial useful life.	S	
CA-14	Asset plans allow users to set inflation value for each asset class.	S	
Funding Forecast			
CA-15	Provides an asset management funding forecast (5, 10, 15, 20, 25 years) that can be represented graphically or in a list view.	S	
CA-16	Presents funding projects grouped by each year.	S	
CA-17	Ability to export funding forecasts into XLS or pdf.	S	
Risk Management			
CA-18	Ability to identify Asset Risk Index (1-100) for all assets or rolled up locations.	S	
CA-19	Allows users to enter Asset Impact Index (1-5) for all assets. Uses Triple Bottom Line (Social, Environmental, Financial) criteria.	S	Can also be expanded beyond triple bottom line.

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CA-20	System automatically calculates Asset Probability Index (1-5) for likelihood of asset failure.	S	
CA-21	System automatically calculates Asset Condition Index (1-5) based on lifecycle or field condition for all assets.	S	
CA-22	System automatically calculates Annual Maintenance Cost relative to Asset Replacement Value to trigger capital improvement.	S	
Capital Planning			
CA-23	Generates funding requirements compared to budget with risk graphs for each year.	S	
CA-24	Present funding requirements with prioritization scores for each capital project.	S	
CA-25	Ability to perform scenario planning by analyzing the consequences of different scenarios relative to risk.	S	
CA-26	Ability to save scenarios and retrieve later.	S	
CA-27	Ability to generate Capital Improvement Project Work Orders to track progress.	S	
CA-28	Ability to defer capital projects based on budgets and scenarios.	S	
Support			
SU-01	System includes online help and tutorial videos.	S	
SU-02	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)	S	
SU-03	Technical support call be answered by a client service manager (in United States) during the agencies Pacific Standard Time regular business hours.	S	The County would have access to our support team in EST and an Account Manager in PST who would provide support.
SU-04	Technical support emails and online submittals will be responded to within one hour during regular business hours.	N	PSD follows a strict SLA with defined response times. We strive to respond to all requests with 24 hours and our team will triage based on the urgency of the request as defined within our SLA.

COMPUTERIZED MAINTENANCE MANAGEMENT SYSTEM (CMMS) SOFTWARE
AND IMPLEMENTATION SERVICES
RFP #10936



SU-05	For critical emergency situations, support response within 15 minutes.	N	Response Time: Within 4 hours from the time PSD Citywide is notified of the Error (for Critical Errors first occurring during business hours 8:00AM to 8:00PM EST) Target Resolution Time: Every attempt is made by PSD Citywide to resolve the Error within 1 working day
SU-06	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 the system.	S	
SU-07	Custom training documentation or videos tailored to County's workflows and system modifications.	M	PSD has included training which can be recorded as part of this solution. Training would be based on the County's configuration.
SU-08	Support contract includes free version updates/upgrades (builds/patches).	S	
SU-09	Automatically migrates all existing fields, including custom fields, to future releases and integrations.	S	

[illegible]

Citywide Maintenance

Work Order Management

When creating a work order, users can include information such as the work order type, priority, resources needed, location and any other relevant information that should be included with the Work Order (WO). If the work order is being generated by electronic workflow approval, key data sets will be automatically populated, including pre-linked processes. Users can also attach the work order to a specific asset and select necessary equipment and materials. The assets available to attach to work orders come from the asset inventory held in Citywide Assets.

Work Orders (WOs) can be initiated by various methods including:

- Approved service requests manually entered by staff
- System generated preventative maintenance reminders
- Preset preventative maintenance events

WOs and Service Requests can be approved and resolved either individually or in a batch format.

Information from work orders or preventative maintenance will be available within the Asset page in Citywide Assets. Additionally, the information is also linked in the resource pages for involved workers, equipment, vendors, and properties.

Preventative Maintenance and Scheduled Maintenance

Preventative Maintenance (PM) schedules that can be applied to different assets or asset types, sub-types, groups, components, etc. Custom PM templates and checklists can be generated by the system. These schedules can be daily, weekly, monthly, bi-monthly, semi-monthly, bi-yearly, semi-yearly, or by user defined schedules.

Triggering maintenance tasks: preventative maintenance schedules can be triggered by usage data, time, or an inspection. The user can also set up an e-mail notification and select which users, or crew members, receive this PM schedule.

The Auto Approve option allows users to pre-approve the creation of work-orders when the maintenance scheduling threshold/frequency is reached. Additionally, we can predefine the work order types, groups, and sub-types so that the system creates the work order in the correct structure automatically.

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RFP #10936



New Maintenance Schedule

Details | Select Assets | Processes

Details **Select**

Name: Description:

Department: Work Order Type Group:

Work Order Type: Work Order Subtype:

Schedule Type: **Preventative Maintenance** **Preventative Maintenance** **Scheduled Maintenance**

Frequency

Start Date: End Date:

Time | Usage | Time And Usage | Time Or Usage

Time

Repeat (Every): Months

Repeat Rule: Nth Day of Month

Day of Month:

Email Alert (Before): Weeks

Auto Approval

Auto Approve Events: Yes ☒ No

Annotations:

- Apply maintenance scheduled to selected assets
- Preventative or Scheduled Maintenance
- Set the cadence metric for maintenance based on different triggers
- Set reminders

Next

Tracking Work Activities

The work order scheduler allows users to select different views that display the various dates, timeframes, and priority of scheduled work orders. Users can also access work order information directly from this schedule, as well as drag and drop work orders directly into the calendar.

psdcitywide Home > Maintenance > Schedule

Default first 100 work orders are shown. Please use below filter to search additional work orders which are not shown.

Filter: Advanced Filter: 1 Selections [Add Work Order](#)

Work Order	Group	Type	Subtype	Department	Classification	Assigned To	Priority	Status	Created Date
WO-8987	001 - ByLaw Enforcement	Force Asset	WO asset	PARKS	Unscheduled Maintenance	Worker	Low	Not Started	2024-03-14 16:34:21
WO-8986	003 - Fleet	DG HVAC Inspection		FLEET & FACILITIES	Unscheduled Maintenance	Worker	Low	Not Started	2024-03-12 14:06:36
WO-8984	003 - Fleet	Street Sign Inspections		ADMINISTRATIVE		Vendor	Critical	Not Started	2024-03-12 13:48:41
WO-8980	Custodial	Custodial - Cleaning		Custodial		Worker	Low	Not Started	2024-03-07 13:40:43
WO-8979	Custodial	Custodial - Cleaning		Custodial		Worker	Low	Not Started	2024-03-06 23:59:27

Month **Week** **Day** **Agenda**

2024

March

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
25	26	27	28	29	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16

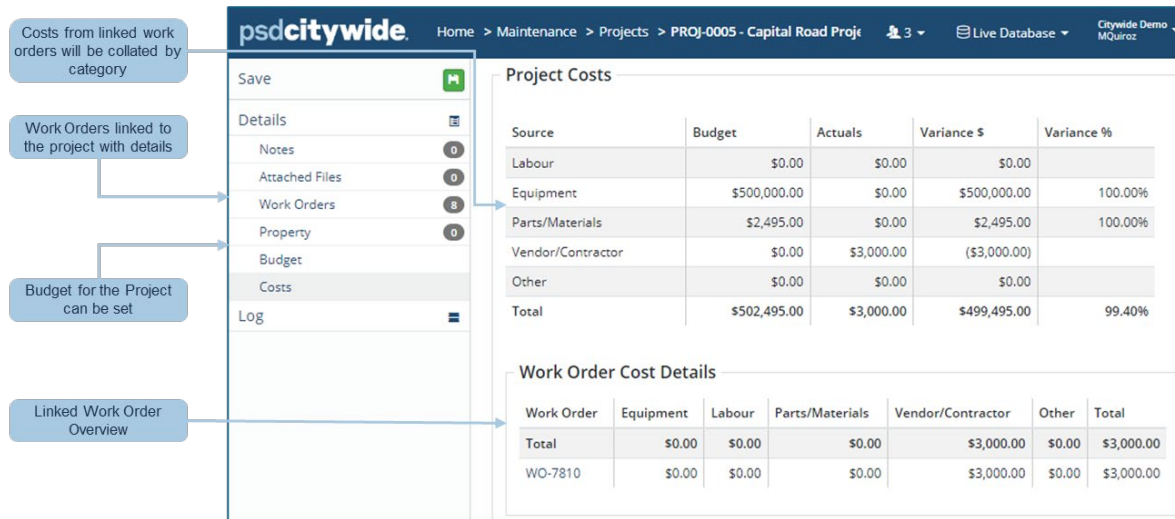
Resource Management

Labor Rates

Multiple labor rates can be added to each worker within the organization and for external vendors. Additional positions and corresponding wages can also be added to a worker profile.

Project Costing

Projects can be created within Citywide Maintenance and used to track budgets and activities. Below is a screenshot of a project and some key cost information. All work orders linked to a project will be attached to the project page and used to track project costs. A budget can be set for each category, allowing for a quick view of actual and variance costs.



Costs from linked work orders will be collated by category

Work Orders linked to the project with details

Budget for the Project can be set

Linked Work Order Overview

Source	Budget	Actuals	Variance \$	Variance %
Labour	\$0.00	\$0.00	\$0.00	
Equipment	\$500,000.00	\$0.00	\$500,000.00	100.00%
Parts/Materials	\$2,495.00	\$0.00	\$2,495.00	100.00%
Vendor/Contractor	\$0.00	\$3,000.00	(\$3,000.00)	
Other	\$0.00	\$0.00	\$0.00	
Total	\$502,495.00	\$3,000.00	\$499,495.00	99.40%

Work Order	Equipment	Labour	Parts/Materials	Vendor/Contractor	Other	Total
Total	\$0.00	\$0.00	\$0.00	\$3,000.00	\$0.00	\$3,000.00
WO-7810	\$0.00	\$0.00	\$0.00	\$3,000.00	\$0.00	\$3,000.00

Labor, Equipment, and Materials by Asset

WOs can be automatically assigned to a specific crew based on predetermined templates. Within the same work order, multiple workers or crews can be assigned to different steps. Depending on workflow control that has been configured, and notification rules, once the WO is created, a notification is sent to the assigned worker.

The WO record has a summary page highlighting items such as resources, asset information, job check-ins and costs, location and details on customer and type of work order as well as a link to the location and GIS information.

All linked work orders, inspections, service requests can be accessed directly through the asset page. This allows for tracking labor, equipment, and materials easily by assets. In addition, several reports allow the user to filter and view detailed information such as "Cost Entries Details" which include all cost transactions for labor, equipment, parts, and materials.

Materials Inventory Management

Parts and materials can be tracked within Citywide Maintenance and added to work orders and service requests. Quantities, costs, and location of the items can all be tracked and added to work order assignments.

Expensing Methodologies

Citywide Maintenance is able to use imported/integrated general ledger (GL) codes to ensure expensing processes currently followed by the organization can be tracked within the system. These GL codes can be linked to labor (wage types, hours, workers, etc.), parts and material costs, and



equipment costs (whether owned or rented). These details can be easily displayed using the default reporting capabilities of the system.

Work Order Assignment

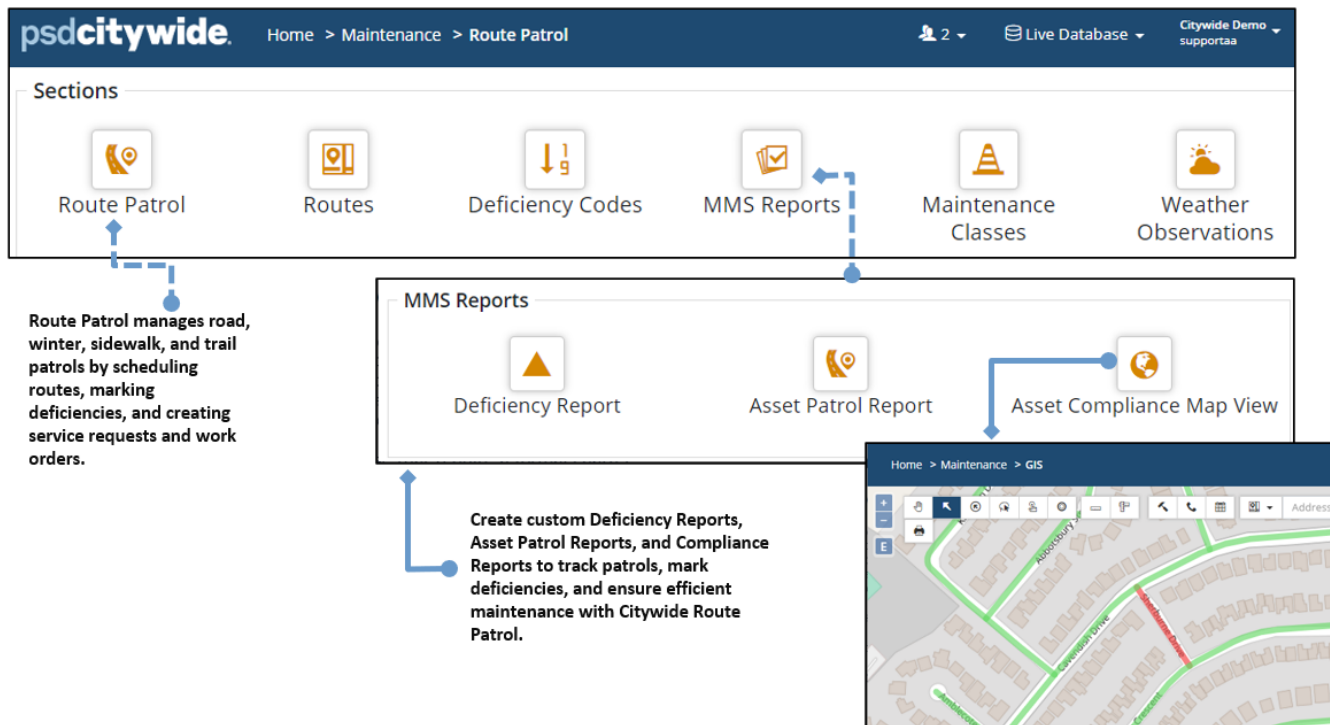
Citywide is flexible to meet the various process needs of organizations and would allow users to implement a work assignment based on Supervisor approval or allow staff to assign work orders to themselves.

Source	Phone	Description	
Details			
Status	Not Started	Address/Location	367016 Mono Centre Road, Mono
Community	Masters Creek	Area	None
Assigned To			
Assigned To	Workers	Workers	None Selected
Schedule Dates			
Scheduled Start Date		Scheduled Start Time	
Scheduled End Date		Scheduled End Time	

Citywide Route Patrol

Citywide Route Patrol is a comprehensive and versatile system designed to efficiently and accurately manage various types of patrols, including road, winter, sidewalk, and trail patrols. By leveraging advanced technologies and industry-standard practices, it offers several key functionalities:

1. **Scheduled Patrol Routes:** The system allows for the creation and scheduling of patrol routes that ensure thorough and systematic coverage of the designated areas. This scheduling capability ensures that patrols are conducted regularly and efficiently, covering all necessary areas without redundancy.
2. **Mobile Deficiency Marking:** Field personnel can use mobile devices to mark deficiencies in real-time. This feature allows for the immediate documentation of issues such as potholes, cracks, snow accumulation, and other hazards. By capturing this information on-site, the accuracy of data is significantly improved, and the response time for addressing issues is reduced.
3. **Manage Service Requests and Work Orders:** Upon identifying deficiencies, the system can generate service requests and work orders. This streamlines the workflow, ensuring that identified issues are promptly addressed. It reduces the administrative burden on staff and improves the overall efficiency of maintenance operations.
4. **Versatile Patrol Capabilities:** Citywide Route Patrol's functionality is designed to accommodate various types of patrols beyond traditional road and winter maintenance. It is equally effective for sidewalk and trail patrols, making it a valuable tool for comprehensive municipal infrastructure management. This versatility ensures that all areas of the city, from major roads to pedestrian pathways, are maintained to the highest standards.



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psdcitywide

Home > Maintenance > Route Patrol

2

Live Database

Citywide Demo supportaa

Sections

Route Patrol

Routes

Deficiency Codes

MMS Reports

Maintenance Classes

Weather Observations

View By: Route Patrol

View Type: Split View

Advanced Filter: No Selections

Showing 85 records

ID	Description	Actions
RP-0110	Lot of traffic today	
RP-0109	Patrol from home, moved def	
RP-0108	route from within house, move	
RP-0107		
RP-0106	Test patrol	
RP-0105		
RP-0104		
RP-0103		
RP-0102		
RP-0101		

Save

Details

Notes

Deficiencies

Path

Work Orders

Service Requests

Road Condition Updates

Assets

Weather Updates

Map

Log

Route Patrol Details

Description: North Middlesex demo

Route: Routine Patrol - East Burli

Maintenance Class: None

Created By: supportcw

Start Time: 2022-07-28 15:19:11

End Time: 2022-07-28 15:25:31

Weather Conditions

Road Condition: Bare and Dry

Weather: Clear

Temperature: 28

Road Temperature: Road Temperature

Visibility: Good

Wind: None

Wind Direction: None

Options

Winter Patrol: Yes No

Actions

Summary Report

Access detailed route information, view patrols on a map, and manage all related data with Citywide Route Patrol.

12:41

5G+

75

Route Patrol

Black Walnut Bakery Cafe

Locomotive Espresso - North

Hortons

Anna London

Ann Street Park

St. Peter's Cathedral Basilica London

Harris Park

Eldon House

Budweiser Gardens

River Forks Park

Ivey Park

York St

Bankley St

STOP

CREATE DEF

CREATE RC

CREATE NOTE

CREATE WO

CREATE SR

WEATHER

Deficiency

Cracks

Debris

Encroachments - Area Adjacent to Sidewalk

Luminaires

Potholes - Road Shoulder

Potholes - Roads

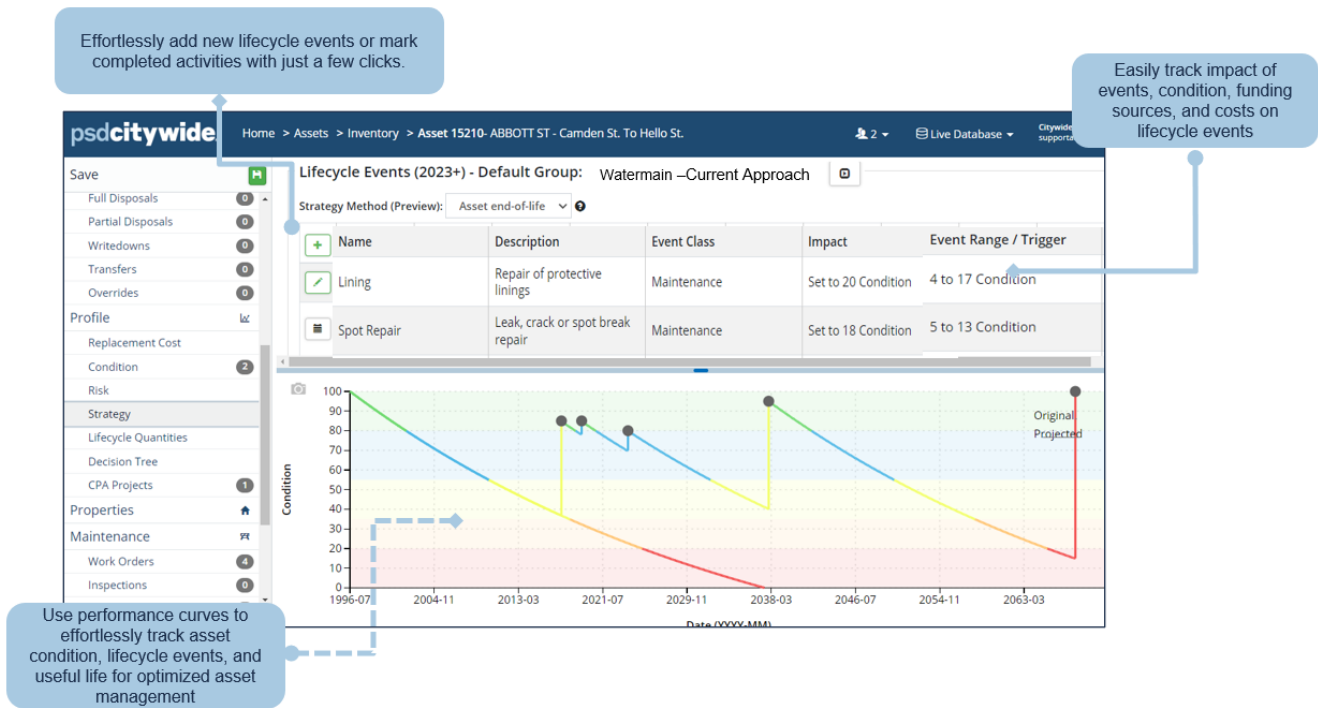
Regulatory or Warning Signs

Create deficiencies on the go with the mobile app and mark issues in real-time, ensuring accurate and timely documentation.

Add road condition info, create notes, work orders, and service requests directly from the Citywide Route Patrol mobile app for seamless and efficient maintenance management.

Citywide Assets

Citywide is a true enterprise solution as all modules within the Citywide EAM suite integrate with each other and draw from Citywide Assets centralized and consolidated data repository, sending asset and maintenance information back and forth between systems as they are updated in real time. Thanks to this system architecture, activities performed in other modules to assets will be visible in the main asset page within Citywide Assets. This means that if inspections are required, they can be scheduled within Citywide Maintenance and all of the costing and work order/inspection information will be available through the inspection/work order record and through the asset page.



Easily record inspection results directly from the field using our intuitive mobile application, ensuring real-time updates on asset condition. Whether data is being recorded individually for specific assets or uploading bulk assessment files, Citywide ensures seamless integration of all information. With every inspection result logged, the system automatically adjusts the asset information, providing you with up-to-date insights on lifecycle strategies.



psdcitywide Home > Assets > Inventory > Asset 15210- ABBOTT ST - Camden St. To Hello St. Citywide Demo support@psdcitywide.com

Save

Insurance/Warranty/Lease

Valuation

Asset Retirement Obligation

Amortization / Accretion

Adjustment Summary

Additions

Full Disposals

Partial Disposals

Writedowns

Transfers

Overrides

Profile

Replacement Cost

Condition

Risk

Strategy

Financial Condition (2023)

In-Service Date: 1996-07-01 EUL: 41 Year(s) 0 Month(s)

Fully Amortized Date (EOL): 2037-07-01 Age-Based Condition: 22.7 - Poor

Asset Age: 27 Year(s) 6 Month(s) Service Life Remaining: 13 Year(s) 6 Month(s)

Projected Condition (2023)

In-Service Date: 1996-07-01 Projected EUL: 59 Year(s) 9 Month(s)

Projected Replacement Date: 2056-04-01 Projected Condition: 69.6 - Good

Projected Age: 8 Year(s) 9 Month(s) Projected Service Life Remaining: 32 Year(s) 3 Month(s)

Condition Assessments

Assessment Date	Assessed By	Assessment Method	Assessed Condition	Details	Actions
2019-06-01	MVD assessments	Standard	85 - Very Good		
2017-06-01	AITC	Standard	85 - Very Good	test	

Mobile Application

Create New Assessment

Asset ID: 32485

Assessment Date: Apr 17, 2024

Assessed By: support

Condition Rating: 0 % - Very Poor

Assessment Details: None

Condition Rating

41 % Fair

0 %

Create New Assessment

Asset ID: 36831

Assessment Date: Apr 17, 2024

Assessed By: support

Condition Rating: None

Assessment Details: None

Condition Rating

[Area] = [Average Annual Daily Traffic (AADT)] + [Bench Length] * [Bury Depth] * [Area]

Area (m2)

Upload Centre

Configuration

Upload Type: Asset Sync

Template: Click to Export

Input

Paste completed template below

Book1 - Excel

Asset ID	Assessed Condition
1	67
2	98
3	90
4	76

Home > Assets > Upload Centre

Reset Submit Upload

Showing 4 records

Row #	Asset ID	Assessed Condition
1	1	67
2	2	98
3	3	90
4	4	76

Asset Page – Centralized Hub to Manage Asset Information and Documents

Citywide offers a centralized and easy to navigate approach to accessing asset information. Users can select an asset record by clicking on the Asset ID of a particular asset within the inventory. The asset page provides users with a centralized hub to all related information on the selected asset.



psdcitywide

Home > AM > Inventory (2023)- Active Inventory and WIP

1 Live Database

Asset Category

Search...

Asset Segment

All Asset Segments

Showing 27,515 records

Asset ID	Asset Category	Asset	Strategic Location	TCA Major Classifications	Profile
1	Trails	Multi-Use T			
2	Trails	Multi-Use T			
3	Trails	Multi-Use T			
4	Trails	Multi-Use T			
5	Trails	Multi-Use T			
6	Trails	Multi-Use T			
7	Trails	Multi-Use T			
8	Trails	Multi-Use T			
9	Trails	Multi-Use T			
10	Trails	Multi-Use Trail	No Asset System	No Strategic Location	No TCA Major Classificati...

Citywide’s Asset Pages are designed to be easy to navigate and provide users with access to data such as historical cost, in-service date, expected life cycle, remaining useful life, levels of service attribute information, and replacement cost. Data such as condition (both assessed and age-based), risk rating, lifecycle events / strategy, and out of service / downtime reports, access and attach documents.

psdcitywide

Home > AM > Inventory > Asset 15210- ABBOTT ST - Camden St. To Hello St.

1 Live Database Citywide Demo MQuiroz

Save

Summary

Asset Details / Flags

Classifications

Attributes 16

Notes 1

Attached Files 2

Insurance/Warranty/Lease

Valuation

Asset Retirement Obligation

Amortization / Accretion

Adjustment Summary

Additions 2

Full Disposals 0

Partial Disposals 0

Writedowns 0

Transfers 0

Overrides 0

Profile

Overview

Name

ABBOTT ST

Description

Road Surface

In-Service Date

1996-07-01

Estimated Useful Life

20 Year(s) 0 Month(s)

Historical Cost

\$40,703.00

Adjusted Cost

\$65,703.00

Replacement Cost

\$122,192.00

Condition/Risk

Overall Projected Condition

76.32 - Good

Age-Based Condition

44.39 - Fair

Risk Rating

6.75 - Low

Fully Amortized Date (EOL)

2037-07-01

Asset Age

27 Year(s) 6 Month(s)

Service Life Remaining

13 Year(s) 6 Month(s)

Projected Age

14 Year(s) 0 Month(s)

Projected Service Life Remaining

27 Year(s) 0 Month(s)

Brief

Is a Primary Asset

Is tied to CPA Projects

Has 2 Addition(s)

Summary Report

Map

Thumbnail

Asset Profiles

Citywide includes built-in data models and processes that support the unique management requirements of each asset system (E.g., Facilities, water, fleet, etc.) Users can define overarching Asset Profiles that allow staff to manage similar asset groups according to standardized approach. Within the Asset Profiles, staff can define a formalized approach to condition ranges, risk framework and lifecycle events by asset system. Individual assets are attached and controlled by the overarching Asset Profile. For example,



below, a profile controls 503 individual link assets and displays total replacement costs and performance data such as condition and risk.

psdcitywide

Home > AM > Asset Profiles > Sanitary Main

1

Live Database

Citywide Demo
MQuiroz

Save

Dashboard

Asset Template

MM Metrics

Lifecycle

Condition

Risk

Events

Strategy

Decision Tree

Log

Dashboard

Name	Value
Number of Active Assets and WIP	1,837
Total Historical Cost	\$16,988,488.10
Total Replacement Cost	\$28,982,792.20
Total Adjusted Cost	\$16,982,711.54
Total Adjusted Cost (Reporting Year)	\$16,982,711.54
Average Condition	68 - Good
Average Risk Rating	6.95 - Low
Average Risk Probability	2.11 - Unlikely
Average Risk Consequence	3.09 - Moderate

Citywide Decision Support

Citywide Decision Support functionality, ensuring users are equipped with advanced predictive modelling to help optimize service levels and short-, medium-, and long-term capital and maintenance spending. Citywide Decision Support will allow the County to create various scenarios for infrastructure asset event strategies, taking into consideration risk, assessed condition and lifecycle event information. Decision Support allows for the generation of unlimited scenarios, comparing up to four simultaneous scenarios at once, and a comprehensive understanding of the impacts of the assessed scenarios on actual available budget dollars.

Users can then quickly and accurately produce dynamic graphs, tables and maps based on generated scenarios and optimal outcomes for use in presentations, asset management plans, or when communicating with the public.

Core Features of Citywide Decision Support

- Citywide Decision Support uses an algorithm to automatically test and compare all possible scenarios for asset event strategies, providing users with the most optimal outcome. Base scenarios on desired levels of service to determine funding requirements.
- Customized weightings (i.e. 40% risk-60% performance) are used to prioritize the most impactful measurements for your organization.
- Toggle between different graphs/outputs to communicate scenarios more clearly for your audience.
- Use the maps feature to plot assets based on performance and/or risk, enabling you to see from a bird's eye view grouped assets and their performance and the changes that occur over different time periods. Produce and develop a long-term capital forecast with your asset data.

Citywide Decision Support Benefits

- Ensure that budget forecasts are based on concrete and accurate asset data.
- Gain a comprehensive understanding of asset profiles and the impacts of various asset intervention scenarios.
- Conduct ad hoc scenario comparisons (i.e. conduct a scenario on all rural road profiles given a \$1 million per year budget versus \$1 million per year plus inflation).
- Perform a quick analysis of various scenarios on all asset categories.
- Ensure that decision-making is based on possible scenarios given budget parameters. Decision Support will identify if a chosen scenario won't work based on the data provided.
- Quickly and accurately produce dynamic graphs and tables to assist with communicating decision points to council, senior management, and the public.

Scenario Example

The County is using Citywide to analyze their asset data and determine appropriate proposed levels of service for road network. Using the asset profiles, the County can run an analysis on the current spending and long-term projections to condition and risk. Users can then also run similar scenarios with user defined annual spending, or condition targets. Users can also create new Asset Profiles and run an analysis should the County adapt its approach to lifecycle management. This provides the County with a holistic view of all information on these assets and allows users to compare the averages (i.e. KPI's, condition, risk, lifecycle, etc....) and the most optimal events to maximize budget dollars.

Decision Support makes infrastructure decision-making easier by:

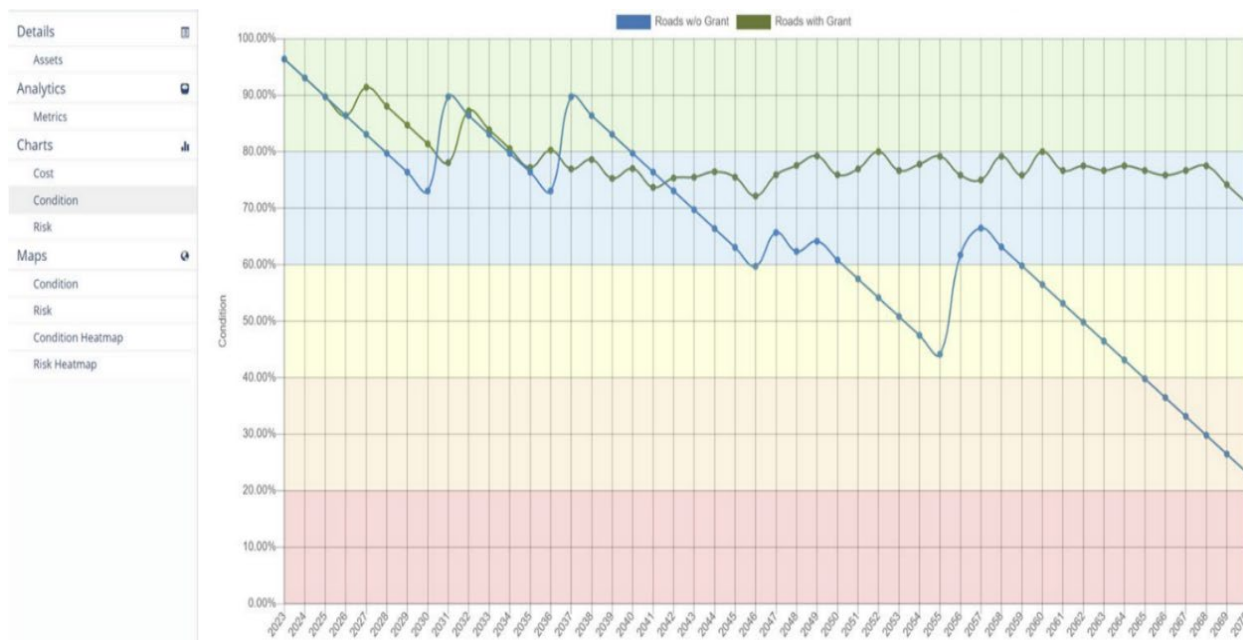
- Ensuring that budget forecasts are based on concrete and accurate asset data.
- Effectively communicating scenarios visually to decision makers.
- Having access to an agile and user-friendly interface to improve efficiency.

Functionality

To further enhance the County's asset management programming, the following is also included in the Asset lifecycle strategies within Citywide Decision Support:

- Ongoing maintenance activities and costs
- Renewal/replacement activities, service thresholds and costs
- Rehabilitation activities, service threshold and cost
- Disposal activities and cost

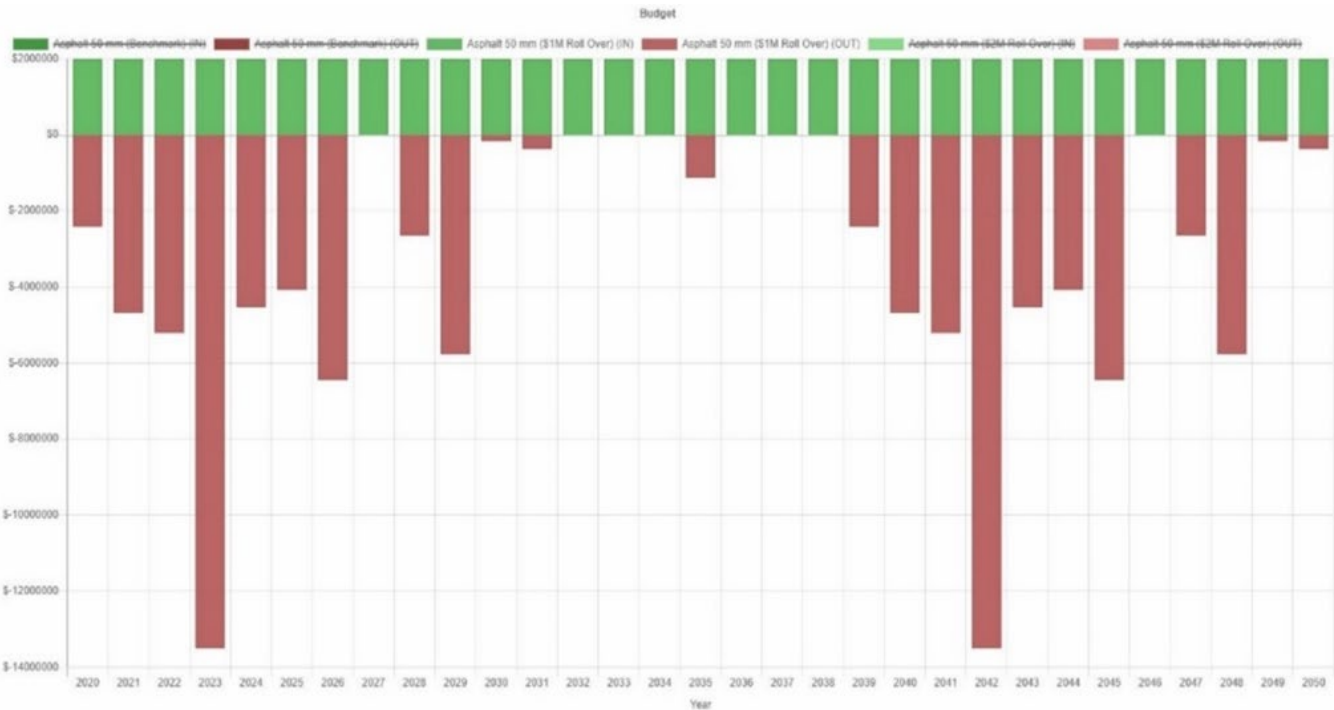
PSD Citywide's Asset Lifecycle Strategy will compare multiple scenarios, where the budgets for each scenario can be the same each year, edited for specific years, or calculated with inflation to understand the cost of lifecycle activities and analyze which activities best contribute to the sustainability of their Asset Management Program, generating a maintenance plan. Multiple scenarios can be compared based on the yearly average condition or risk:





Within the strategy, for each asset category, recommendations will be made to determine the optimal lifecycle activities and options available to the County to ensure the long-term viability of the County’s infrastructure and general capital while achieving the lowest total cost. This analysis will also have the options to discount costs and/or add inflation and will provide scenarios that include a full report of yearly budgets and costs.

Users can compare multiple scenarios and can name and update comparisons later without recreating them.



psdcitywide

Home > DS > Comparisons

Comparisons

Filter

Name

Roads Paved 7.5M vs 6M

test

UG 2022 Scenario

New Comparison

Comparison

Name

Created By

aobrien (Alison O'Brien)

Scenarios

Filter

Up to 4 Scenarios can be used in a comparison

Scenario ID	Name	Run Date	End Year	Budget	Budget Rollover
☐ DS-0052	Fort Sask	2022-07-18	2035	\$6,000,000.00	No
☒ DS-0051	Roads - Budget + Grant	2022-07-14	2035	\$7,500,000.00	No
☒ DS-0050	Roads - Current Budget	2022-07-14	2035	\$9,000,000.00	No
☐ DS-0049	Arterial Roads - Budget + Grant	2022-07-14	2050	\$15,000.00	No
☐ DS-0048	Arterial Roads - Current Budget	2022-07-14	2050	\$10,000.00	No
☐ DS-0047	TBay Demo	2022-07-07	2035	\$7,500,000.00	No
☐ DS-0046	UG 2022 Testing	2022-06-17	2040	\$3,500,000.00	No
☐ DS-0045	UG2022 Scenario 1 (9M)	2022-07-07	2035	\$9,000,000.00	No
☐ DS-0039	UG 2022 Scenario 2 (6M)	2022-07-07	2035	\$6,000,000.00	No
☐ DS-0037	Testing Nov 30	2021-11-30	2035	[CUSTOM]	No

Cancel

Add

Date

07 11:44:11

02 08:33:49

17 09:58:00

+ New Comparison

Actions

Citywide can generate side-by-side comparisons of Key Scenarios used to quantify the benefits/detriments of different budgets employed by the County. Below is an example:

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Asphalt 50 mm (Benchmark)

Years: 30
Profiles: 1
Assets: 244
Events: 4

Avg Condition: 64%

Avg Risk: 5.2

Asphalt 50 mm (\$1M Roll Over)

Years: 30
Profiles: 1
Assets: 244
Events: 4

Avg Condition: 27%

Avg Risk: 10.7

Asphalt 50 mm (\$2M Roll Over)

Years: 30
Profiles: 1
Assets: 244
Events: 4

Avg Condition: 43%

Avg Risk: 8.5

Infrastructure renewal and replacement needs typically exceed available financial resources. To ensure that these limited funds are allocated optimally, it is important that project prioritization parameters are developed to ensure that the right projects come forward into short- and long-term capital planning. Risk is also a key measure of the level of service being supplied to the community at large. A good risk model will therefore quantify how much risk is currently associated with the delivery of infrastructure services and provide a framework for analysis and management processes which address, mitigate, or reduce risk.

Asphalt 50 mm (Benchmark)

Condition	Replaced	Event	Skipped	Broken																												
Asset	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046	2047	2048	2049	2050	
14336	67%	63%	58%	53%	47%	42%	36%	29%	23%	15%	100%	97%	94%	91%	87%	83%	80%	76%	71%	67%	62%	57%	52%	47%	41%	35%	29%	22%	15%	100%	97%	94%
14337	100%	100%	97%	94%	91%	87%	83%	80%	76%	71%	67%	62%	57%	52%	47%	41%	35%	29%	22%	15%	100%	97%	94%	91%	87%	83%	80%	76%	71%	67%	62%	57%
14338	50%	44%	39%	32%	26%	19%	100%	97%	94%	91%	87%	83%	80%	76%	71%	67%	62%	57%	52%	47%	41%	35%	29%	22%	15%	100%	97%	94%	91%	87%	83%	80%
14351	38%	32%	26%	19%	100%	97%	94%	91%	87%	83%	80%	76%	71%	67%	62%	57%	52%	47%	41%	35%	29%	22%	15%	100%	97%	94%	91%	87%	83%	80%	76%	71%
14362	32%	26%	19%	100%	97%	94%	91%	87%	83%	80%	76%	71%	67%	62%	57%	52%	47%	41%	35%	29%	22%	15%	100%	97%	94%	91%	87%	83%	80%	76%	71%	67%

Asphalt 50 mm (\$1M Roll Over)

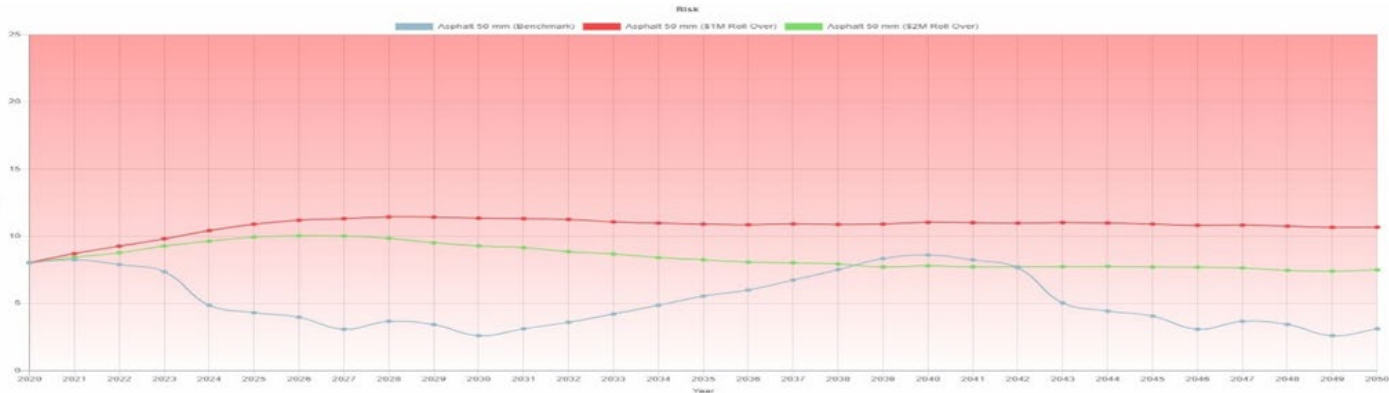
Condition		- Replaced		- Event		- Skipped		- Broken																								
Asset	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046	2047	2048	2049	2050	
14336	67%	63%	58%	53%	47%	42%	36%	29%	23%	16%	8%	1%	2%	100%	97%	94%	91%	87%	83%	80%	76%	71%	67%	62%	57%	52%	47%	41%	35%	29%	22%	16%
14337	15%	8%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	16%
14338	50%	44%	39%	32%	26%	19%	100%	97%	94%	91%	87%	83%	80%	76%	71%	67%	62%	57%	52%	47%	41%	35%	29%	22%	15%	100%	97%	94%	91%	87%	83%	80%
14351	38%	32%	26%	19%	12%	4%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	16%
14362	32%	26%	19%	100%	97%	94%	91%	87%	83%	80%	76%	71%	67%	62%	57%	52%	47%	41%	35%	29%	22%	15%	100%	97%	94%	91%	87%	83%	80%	76%	71%	67%

Asphalt 50 mm (\$2M Roll Over)

Condition		- Replaced	- Event	- Skipped	- Broken																											
Asset	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046	2047	2048	2049	2050	
14336	67%	63%	58%	53%	47%	42%	36%	29%	23%	100%	100%	97%	94%	91%	87%	83%	80%	76%	71%	67%	62%	57%	52%	47%	41%	35%	29%	22%	100%	100%	97%	94%
14337	100%	100%	97%	94%	91%	87%	83%	80%	76%	71%	67%	62%	57%	52%	47%	41%	35%	29%	22%	100%	100%	97%	94%	91%	87%	83%	80%	76%	71%	67%	62%	57%
14338	50%	44%	39%	32%	26%	19%	100%	97%	94%	91%	87%	83%	80%	76%	71%	67%	62%	57%	52%	47%	41%	35%	29%	22%	100%	100%	97%	94%	91%	87%	83%	80%
14351	38%	32%	26%	19%	12%	4%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	16%	
14362	32%	26%	19%	100%	97%	94%	91%	87%	83%	80%	76%	71%	67%	62%	57%	52%	47%	41%	35%	29%	22%	15%	100%	97%	94%	91%	87%	83%	80%	76%	71%	67%



Users can focus on minimizing exposure to risk using risk-based analysis to drive asset management decision-making and capital project prioritization at the County, therefore contributing to the prevention of consequential asset failure and major service disruption. The below screenshot depicts 3 different scenarios with inputs for asset profile, plan duration, risk weighting and projected budgets that can be compared by the County based on their yearly average condition or risk.



Users can view asset event costs across entire scenarios in a CRP format, and can see total costs by asset, year, or by profile.

psdcitywide

Home > DS

Sections

Scenarios

Comparisons

Reports

Capital Replacement Profile

psdcitywide

Home > DS > Report > Capital Replacement Profile Report > Data

	Name	2021	2022	2023	2024	2025	2026	2027
	Roofing	-	-	-	-	-	-	\$102,000.00
	35774 - B3010 - Roof Coverings	-	-	-	-	-	-	\$102,000.00
	35803 - B3010 - Roof Coverings - BUR	-	-	-	-	-	-	-
	35863 - B3020 - Roof Openings	-	-	-	-	-	-	-
	35872 - B1020 - Roof Construction	-	-	-	-	-	-	-
	35893 - B3010 - Roof Coverings	-	-	-	-	-	-	-
	35894 - B3010 - Roof Coverings - Soffit	-	-	-	-	-	-	-
	35917 - B3010 - Roof Coverings	-	-	-	-	-	-	-

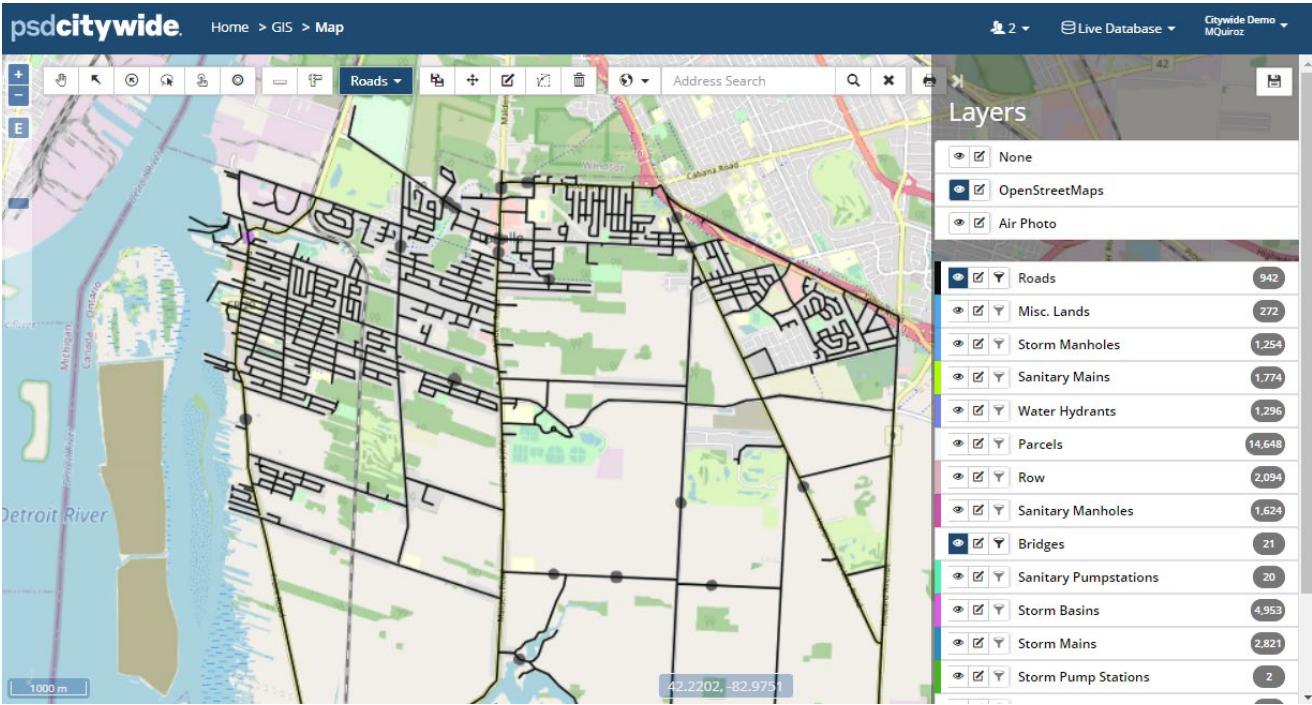


Citywide Decision Support also allows staff to easily visualize and run a map that shows condition or risk based on the scenario over time. These visual functionalities enhance communication to council and senior staff.



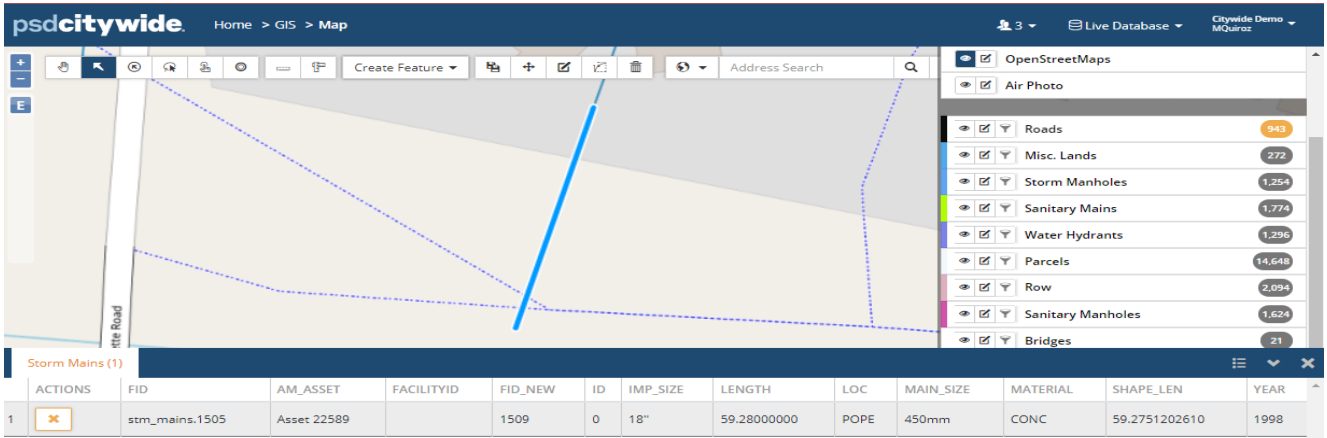
GIS Viewer

GIS viewer consumes the ESRI ArcGIS Web map services and presents asset data on a map for users. Users can quickly load an asset through the GIS Viewer by clicking on the GIS Globe within Assets. This can be accomplished at their desktops through the Citywide interface or from the mobile application. Using the Address Search bar, users can search by address, region, or zone.



Asset Selection

Users can select individual assets from the map and view asset information, attributes and any other data appended to the asset. All assets are directly linked to the Assets Database and matched through the ArcGIS integration, meaning that the utility can ensure assets (linear and others) are segmented per industry standards and standardized across systems. Using the Print or Save icons on the top bar, users can save, print, or export map views.

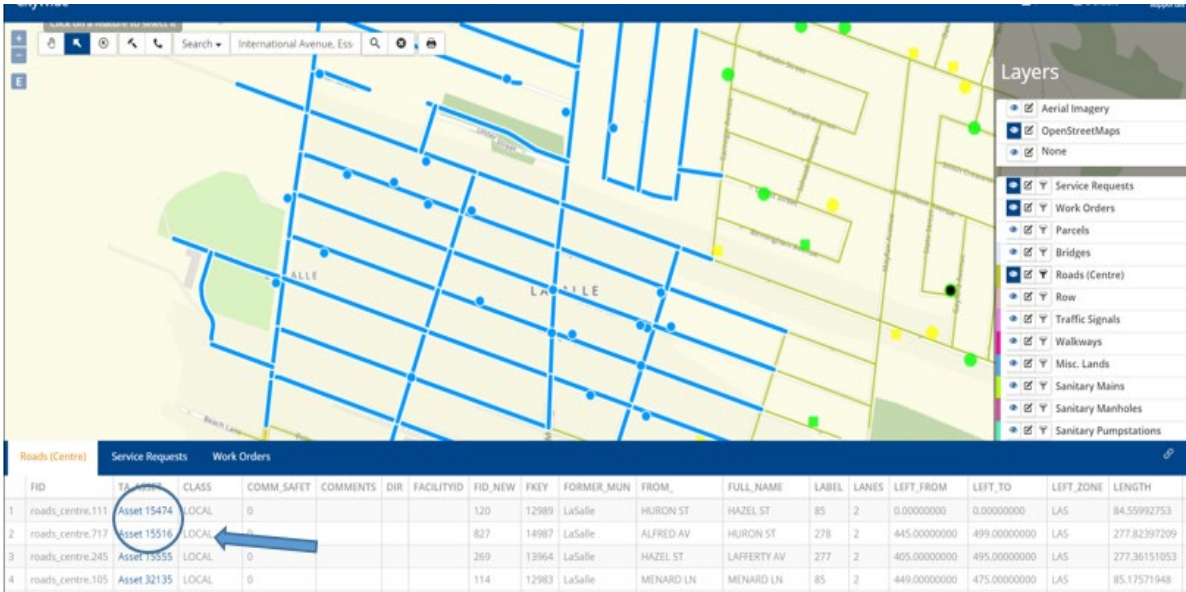


Confidential – Do not release
RFP #10936

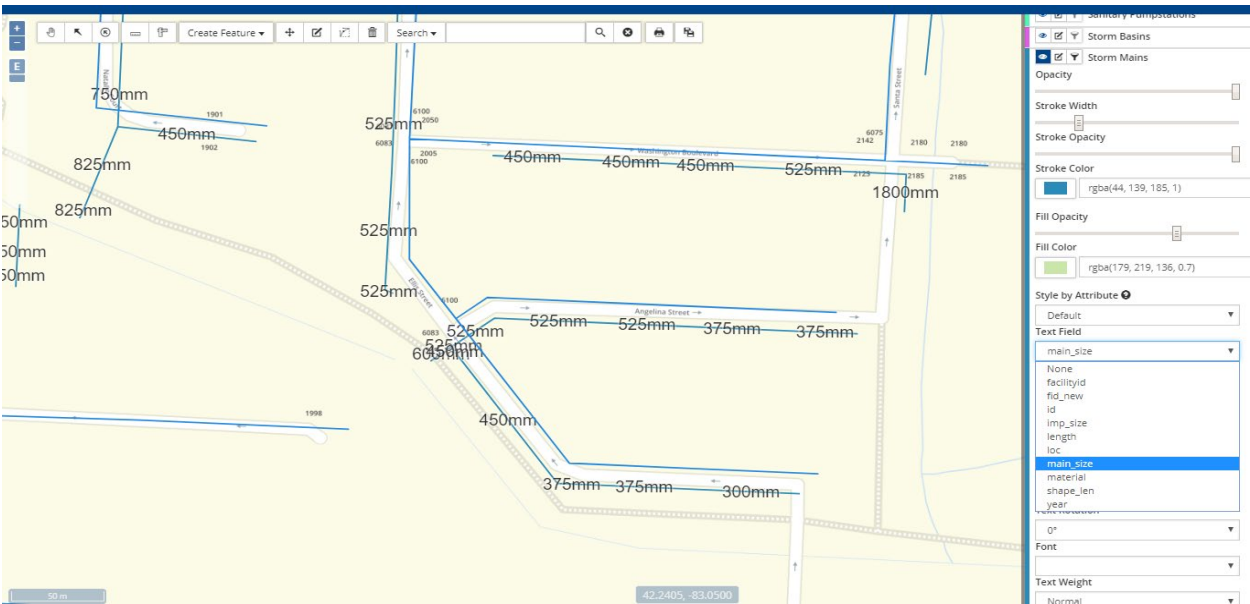


GIS Multiple Asset View

Users can select one or multiple assets on the GIS map, using various means including a lasso. A list of the selected assets appears below the map where the Asset information is displayed. Additionally, Citywide includes Coordinated IDs so that assets can be linked together, for example a facility and its components.



Additional asset information can also be displayed on the map. Text fields such as pipe diameter, installation date, material, length, can be displayed alongside the asset.

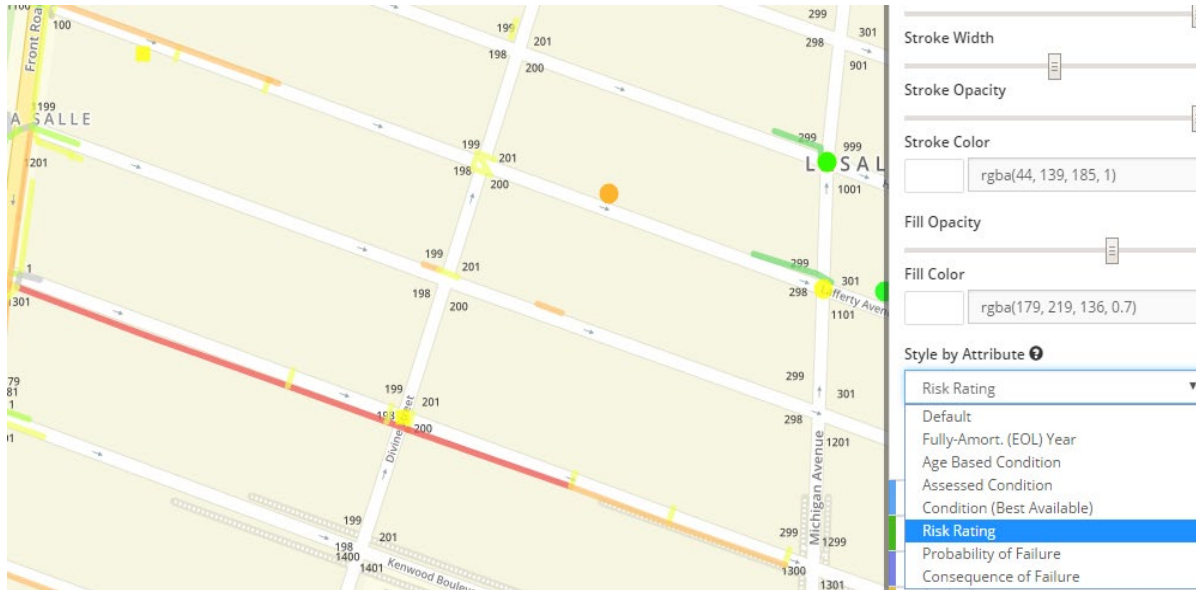


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GIS Layer Style

The map below shows the information on sanitary mains, storm mains, storm pump stations, water hydrants, and water mains, sorted by age or condition. Users can display the assets by different styles such as Age Based Condition, Assessment Condition, Amortization, Risk Rating, etc. Each asset linked on the map also contains links to the Work Order and Asset Information. This is helpful when planning lifecycle activities on infrastructure when users wish to compare risk and condition of overlapping assets.



Creating Assets from Features

This feature allows users to bridge the gap between their GIS Features and linked Assets allowing them to open a wizard to create Assets and link them to the remaining GIS Features. This integration will run every night, so records are up to date.

Citywide Mobile Application

All contributors, pending permission from the County, are able to use either the mobile or desktop application, allowing for flexibility in accommodating the performance of both field and desk duties.

Ease of Use for Mobile Work Requests and Inspections

Citywide's mobile application was designed for users that generally perform their duties in the field. As such, this application has been optimized to suit the needs of field staff, and consequently not every functionality of the system is needed or available on a mobile platform i.e., system administration, reports, or workflow modifications, will not be available on the mobile application. The app is designed and optimized for mobile devices, to ensure the application is optimized for different size screens.

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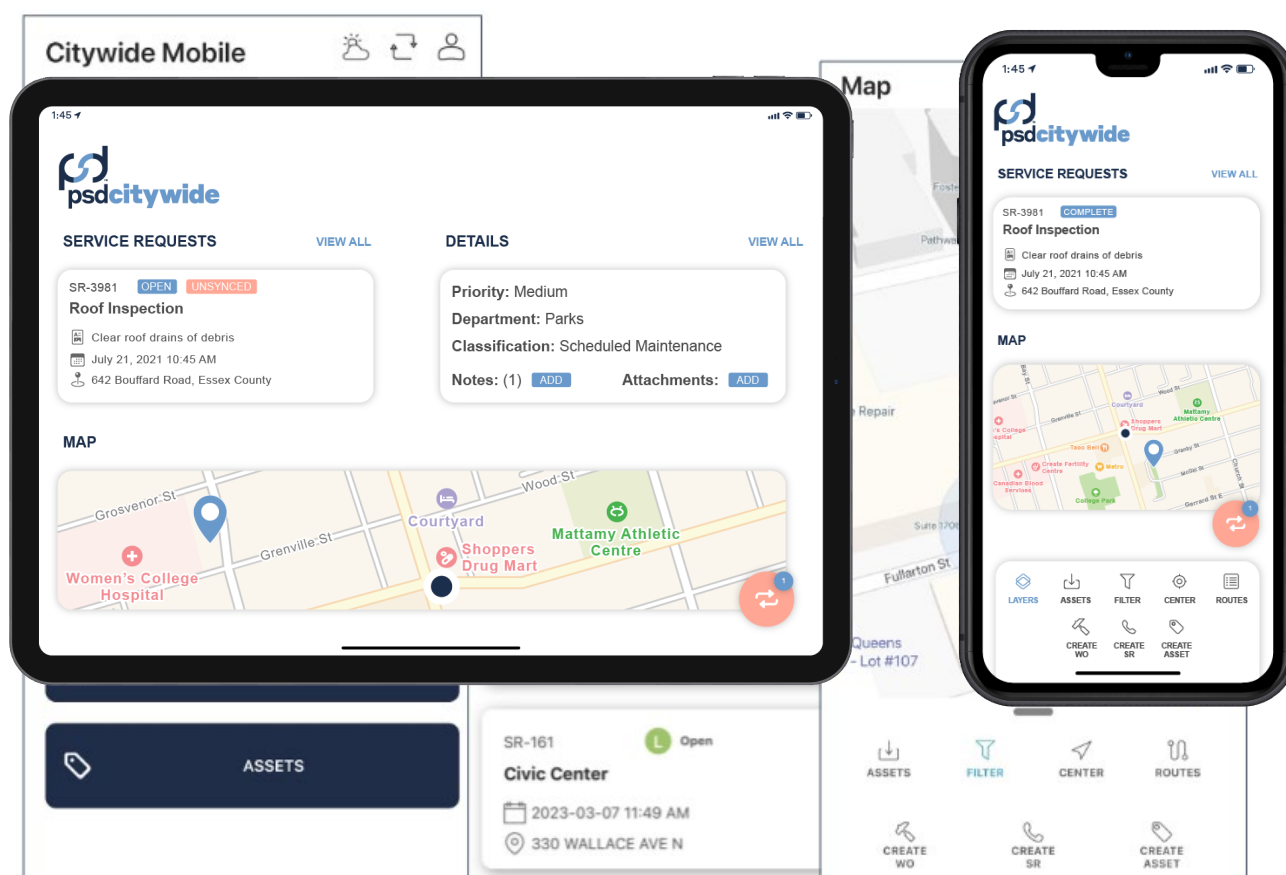
Ability to Scan Barcode/QR Code for Inventory, Assets, Equipment, Vehicles

Users can download up to 500 equipment records based on Citywide Maintenance user preferences, use the search bar and/or integrated barcode scanner to quickly find the equipment that you need in the field, update Work Order equipment requirements, and add usage directly from the mobile application.



Citywide Mobile Screenshots

Our Maintenance Management system gives users the ability seamlessly access work order information on the field, whether through a map interface or directly within the work order itself. This functionality enables maintenance personnel to efficiently locate and navigate to the designated work locations. By integrating with mapping services, Citywide Maintenance can display work orders on an interactive map, visually representing their geographic locations.



PSD Citywide offers a robust and user-friendly interface that simplifies the creation and editing of work performed in the field. This system provides maintenance personnel with a stable and intuitive platform to accurately document their activities and progress on the field and off the field. Through the Citywide Maintenance interface, field workers can easily create new work records, capturing essential details such as the nature of the task, equipment used, time spent, pictures taken of assets or work on the field, and any additional notes or observations.

The interface allows for efficient editing of work orders, enabling personnel to update task statuses, add supplementary information, or make necessary revisions. This streamlined process of creating and editing work performed in the field enhances the municipality's maintenance operations by promoting accuracy, accountability, and effective communication among field personnel and central management.

Users can access Citywide on tablets or smartphones using the browser functionality, and/or for Citywide mobile app operated on android and iOS. All information from the mobile application is automatically updated on the web-based system. If the information was entered in an area without internet access, the mobile application can work offline and update all information entered once an internet connection is found.

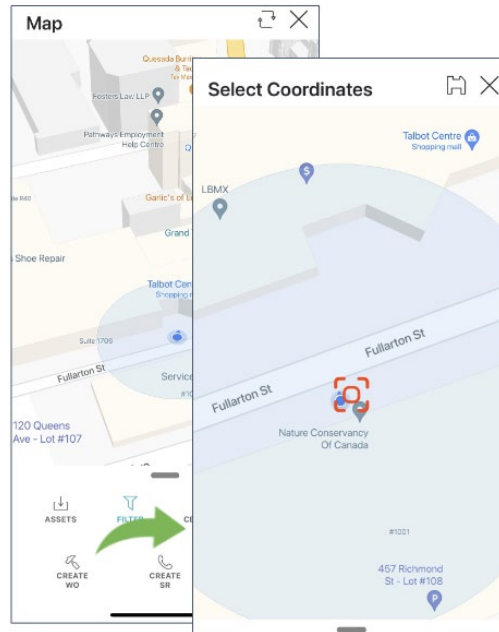


Exhibit D
PSD Cityside Proposal for Services for Public Works Division



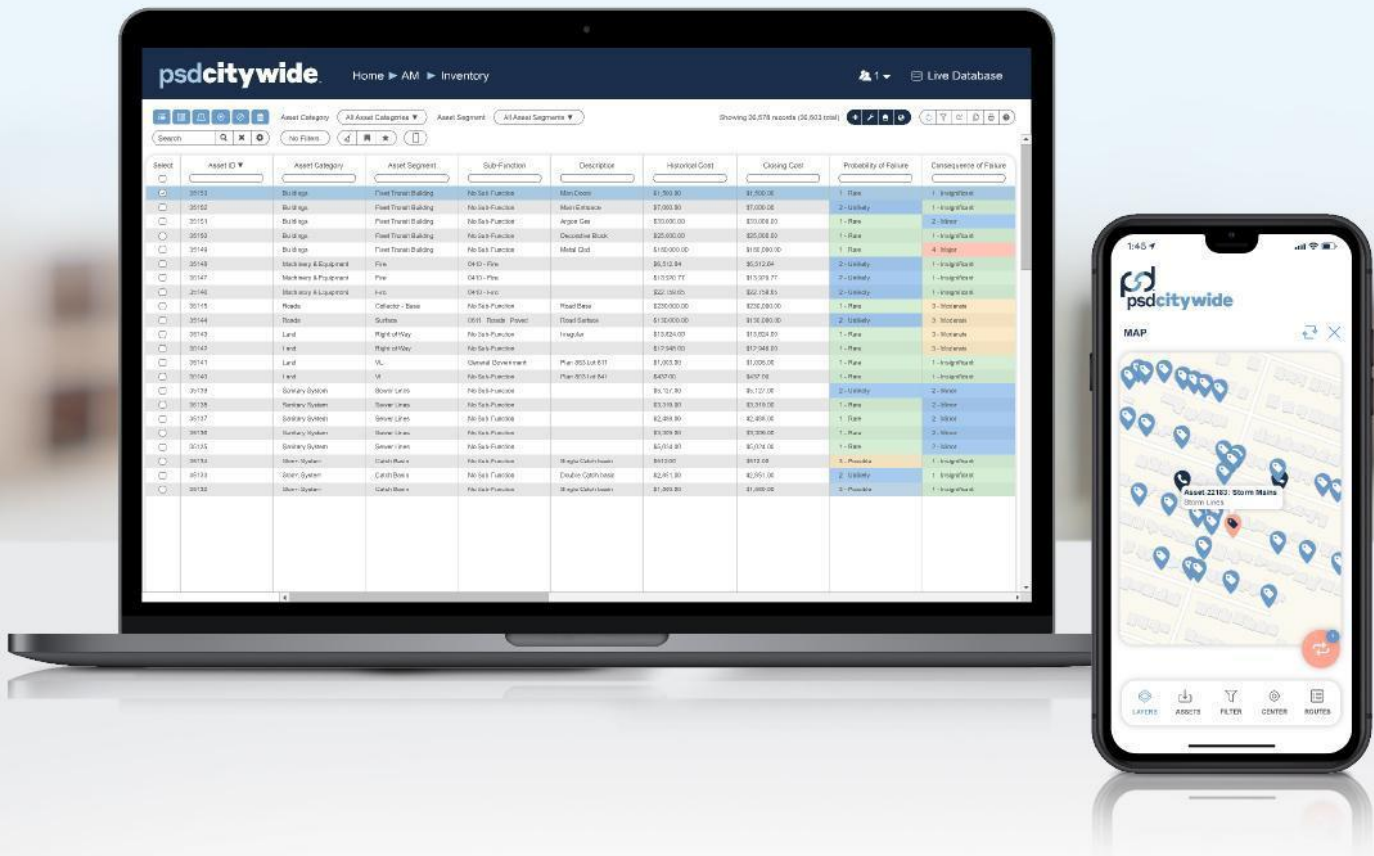
Citywide Enterprise Asset Management System

Service License Agreement

Monterey County – Public Works Division

Submitted by:

PSD Citywide (US) Inc.
400 Continental Blvd.
El Segundo, California, 90245
Name: Anita Frost
e: afrost@psdcitywide.com
p: (619) 565-9374





Contact List

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Patricia Small	Management Analyst II	(831) 784-5929	SmallP@countyofmonterey.gov

PSD Citywide (US) Inc. ("PSD Citywide")

Name	Title	Telephone	E-Mail
Anita Frost	Account Executive	619-565-9374	afrost@psdcitywide.com
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Kristie Lapointe	Client Success Operations	519-690-2565 Ext. 2509	klapointe@psdcitywide.com
Christie Wiggers	Director, Implementation Services	519-690-2565 Ext. 2708	cwiggers@psdcitywide.com

Service License Agreement

This Service License Agreement, including all pricing and outlined terms, is valid for 60 days. After this date, the terms and pricing outlined within may be subject to revision or withdrawal. We encourage timely review and communication to ensure alignment with the current SOW details.

Service License Agreement Date: June 4, 2025

Version: 1.0



Project Deliverables

The purpose of this project is to implement both Citywide Assets and Citywide Maintenance Modules as part of the Citywide Software Suite. The aim is to provide the Client with a complete asset registry for all asset types and a maintenance management solution that encompasses service requests, work orders, and preventative maintenance. This dual implementation will support the Client's financial reporting and enhance its Asset Management practices by offering a centralized system for utilizing data and managing asset maintenance efficiently.

As part of this project's deliverables, PSD will provide the following for both the Citywide Assets and Citywide Maintenance modules:

- Web-hosted solutions for Citywide Assets and Citywide Maintenance, accessible to an unlimited number of client users within the Public Works Division
- Provide software as per agreed in the SLA and as reflected within the pricing charts within this document.
- Professional services to implement the software.
- Comprehensive training for admin users on how to effectively use both the Citywide Assets and Citywide Maintenance platforms.
- Ongoing software support for both modules, covering bug reporting and fixes to ensure smooth operation.

1. Citywide Assets

Citywide Assets is a comprehensive enterprise asset management solution that supports all asset classes and serves as a central database for asset information across the organization. Designed to align with industry standards, it offers advanced asset management capabilities, including lifecycle planning, risk management, service level assessment, and decision support.

Users can create asset data hierarchy using industry-standard naming conventions, like Uniformat coding, and create detailed asset profiles. These profiles facilitate the generation of lifecycle strategies, risk matrices, and condition reports. Additionally, Citywide Assets enhances financial reporting accuracy and efficiency, integrating asset data into financial processes seamlessly. The system also features a GIS viewer, enabling users to visualize and access asset information through a dynamic mapping interface, thereby improving infrastructure planning and communication around asset management.



2. Citywide Maintenance

Citywide Maintenance is a comprehensive Computerized Maintenance Management System (CMMS) with built-in service request, work order, and preventative maintenance applications. It is specifically designed to empower all municipal departments to prioritize, schedule, and track maintenance projects seamlessly. Whether in the office or out in the field, users can access and manage service requests and work orders, streamlining day-to-day maintenance operations. Built from the ground up to meet the unique requirements of Public Works, Citywide Maintenance facilitates efficient workflow management, project tracking, and resource allocation. At its core, it supports municipalities in planning, managing, assigning, recording, and reporting on all types of work completed as part of their operations, ensuring transparency and accountability. As an enterprise, cloud-hosted solution, Citywide Maintenance integrates fully with the Citywide suite of modular tools, including asset management, GIS, and permits management. All modules are hosted, developed, and supported by PSD Citywide, offering a unified and robust system for managing municipal operations.

Additionally, Citywide Maintenance includes a mobile application, designed for staff to access and update work order information in real-time while in the field. The mobile app allows users to review and complete work orders, update schedules, and manage priority tasks, even when offline. Once an internet connection is available, all information is automatically synchronized, ensuring that field operations are as efficient and reliable as office-based work.

3. GIS Viewer

Citywide GIS Viewer integrates GIS data into the Citywide platform, offering users an enhanced experience in accessing and managing geographic information. This integration improves data accessibility, reduces manual data entry errors, and supports better decision-making by providing a unified view of geographic data.

Integration Options

1. Automatic Integration

This method seamlessly connects to WMS/WFS services using a common ID, enabling the direct loading of related assets and custom links for immediate access. By automatically displaying GIS data, this approach ensures smooth data integration and enhances workflow efficiency.

2. Manual Integration

This option imports GIS files as points, linking them to inventory assets through unique IDs. Supported by scheduled tasks, this method automates data synchronization, ensuring accurate and up-to-date information is maintained across systems.



Project Scope

Legend			
✓ = Included	✗ = Not Included	T = Training only	TBD = To be determined

Citywide Assets

Asset Classes to be Implemented

Asset Classes	In Scope
Roads, Traffic and Transportation	✓
Bridges	✓
Storm Water	✓
Facilities, Parks, and other Division Assets	License Not Included

Citywide Maintenance

Client Business Units to be Implemented

Business Unit	In Scope
Public Works Portfolio (Streets, Storm, Lights, etc.)	✓
Parks	License Not Included
Facilities	License Not Included
Code Enforcement, Other	License Not Included



Citywide Maintenance

Features	Public Works
Service Requests	✓
Customers & Properties (Upload existing data)	✓
Activity Based Work Orders	✓
Asset Based Work Orders	✓
Inspection Work Orders	✓
Process Checklists	✓
Preventative & Scheduled Maintenance [Up to 100 Unique Schedules]	✓
Workflow Notifications	✓
Sandbox for Training & Testing	✓
Training Core & Admin	✓
Training End User	✓
Training Mobile	✓
Resource Costing – Labor	✓
Resource Costing – Equipment	✓
Resource Costing – Parts & Materials	✓



Project Schedule

The estimated duration of this project is **8 months**. The detailed project schedule and Gantt chart will be supplied after the kick-off meeting and will be reviewed and approved in phases as the project progresses. The duration of the project is dependent on multiple factors including client availability as well as data activities. Note that Client time and resources will be required regularly throughout the project as part of the following steps:

1. Completing data templates,
2. Testing the system during the designated testing period to ensure proper configuration, and
3. Participation in applicable training sessions.

Project Communication

Clear and efficient communications between the Client and PSD is vital to project success. In the kick-off meeting, the main point of contact for PSD and the Client will be decided upon and the Client will be introduced to PSD's Project Management Tool, Kantata, in which clients can have access to view the progress of the project. All high-level client communications, including project progress updates, scheduling future meetings/workshops and sending of data should be done between these individuals unless stated otherwise throughout the project. In addition, every two weeks starting with the kick-off meeting, the PSD Project Manager will provide a project status update that includes progress of tasks completed to date and the timelines and milestones of activities moving forward. Alternatively, the client can check project progress, statuses, and updates through Kantata.

PSD Citywide project management effort is influenced by the duration of the project. Deviations from the project duration proposed may result in additional costs.

Project Change Management and Client Responsibilities

1. Client Responsibilities and Adherence to Schedule

The Client is required to prioritize scheduled meetings and tasks as detailed in the project plan. Delays in attending these meetings or completing assigned tasks may lead to adjustments in the project timeline and potential additional costs.

2. Adjustments Due to Requirement Changes

If the Client's detailed requirements significantly deviate from the initial assumptions made during project planning and proposal, PSD Citywide may need to revise the project scope and pricing. Any additional work required will need Client approval and may lead to extended project timelines and additional fees.

3. Data Quality Assumptions

The project assumes that the Client will provide data that is complete, consistent, and formatted according to mutually agreed-upon standards. Should significant data quality issues arise—such as missing critical information, data format discrepancies, or inconsistencies that impede processing—PSD Citywide will provide an estimate for the additional work required to remediate these issues. This may also necessitate adjustments to the project timeline and budget.

4. Change Order Process



For any changes in project scope, requirements, data issues, or significant schedule delays, a formal change order will be issued. The Client must approve this change order before any additional work begins. The change order will detail:

Additional work required.

A revised timeline and resource allocation.

An updated cost estimate for the additional services.

PSD Citywide Software License & Support Terms and Conditions

PSD Citywide (US) Inc. to:

- Provide an enterprise user license, for the Public Works Division, for the use of **Citywide Assets** as per the agreed price.
- Provide an enterprise user license, for the Public Works Division, for the use of **Citywide Maintenance** as per the agreed price.
- Provide user and technical documentation in electronic format.
- Provide software as per agreed in the proposal and as reflected within the pricing charts within this SOW.
- Provide managed data files and storage up to 50GB.

Client to:

- Provide to PSD Citywide (US) Inc. a purchase order for \$86,400.00 for an enterprise user license, for the Public Works Division, of **Citywide Assets** and **Citywide Maintenance** and \$0.00 for implementation & consulting services of the above-mentioned Citywide modules.
- Provide to PSD Citywide (US) Inc. with a purchase order for \$78,500.00 for Annual Version Protection and Maintenance for **Citywide Assets** and **Citywide Maintenance**.

Training

PSD follows the "Train the Trainer" model such that Client Admin users are trained to be comfortable with the system functionality to the level where they can conduct in-house end user training with additional users. Training can occur on-site or remotely (via the web or phone). On-site training is subject to standard travel and accommodation expenses as outlined in the Project Budget section below. Training hours must be used before the completion of the project.



Usage Terms:

WARNING: This Software is protected by copyright.

This software is owned by PSD Citywide (US) Inc. and is protected by U.S. and Canadian copyright laws and international treaty provisions. Therefore, you must treat the software like any other copyrighted material (for example a book). You may print help text or other documentation on hard copy for your own use.

You may not sell, lease or otherwise make available the software or any of the accompanying materials to a third party. You may not reverse engineer, decompile or disassemble the software. The terms for your usage of this software are governed by an agreement between your organization and PSD Citywide (US) Inc.

You are obligated to adhere to the terms of this agreement. If you do not have such an agreement, you are installing this software illegally, and should immediately cease the installation process and return any media to PSD Citywide (US) Inc.

Annual Version Protection and Maintenance Terms and Conditions

The Annual Version Protection and Maintenance fee is billed annually in advance and is payable within 30 days of invoice. Should the licensee opt to discontinue the support service, the invoice should be immediately returned to PSD Citywide (US) Inc. unpaid, with a letter to that effect.

What the Annual Version Protection and Maintenance fee entitles the licensee to:

- ✓ Version Protection such that the Client will have access to added software enhancements without additional cost.
- ✓ Web Hosting such that PSD will provide redundant internet connections, daily backup both on and off-site of client data, 24 Hour video, on-site security, and fire suppression.
- ✓ Access to the Citywide Support Center to report software issues and access the online user guide.
- ✓ Additional requests for guidance, consulting or advice on the use of the software that would not be considered consulting services as determined by PSD Citywide (US) Inc.

What the Version Protection and Maintenance Support fee does not entitle the licensee to:

- ✗ Consulting services: There is sometimes a fine line as to what can be handled as support, vs. a consulting service. While we attempt to handle as much as possible as support, when a request is made to implement a process change or an enhancement which is specific to a customer, and the advice or work extends beyond a general description of the steps required, we will suggest purchasing additional consulting time to implement the new requirement. Services will be billed at the current hourly rate, which will be invoiced at the end of the month. The Client will be made aware of any billing prior to providing assistance.



Pricing

Summary

Implementation Services	Amount
Citywide Assets	\$10,800.00
Citywide Maintenance	\$48,600.00
Value Added Features & Services	\$27,000.00
Total Implementation Services	\$86,400.00

Annual Version Protection & Maintenance	Amount
Citywide Assets + Maintenance	\$62,000.00
Value Added Annual Version Protection & Maintenance	\$16,500.00
Total Annual Version Protection and Maintenance	\$78,500.00

Additional Notes on Services:

Training plans and costs outlined below include online training only. Travel expenses will be billed at cost should the County request in person training.

All other integrations requested within the RFP are out of scope for this phase of the project.



Project Budget (Assets and Decision Support Module)

Implementation Professional Services		Amount
Project Management	Needs Assessment, Kickoff Meeting, Project Planning, Schedules, Status Reports, Update Meetings, Issues and Go-Live Planning	\$1,800.00
	Total Project Management	\$1,800.00
Implementation & Configuration	Data Review & Formatting	\$5,400.00
	Database Hierarchy Configuration	
	User Defined Attributes Configuration	
	Data Import	
	Configure Users, Roles & Permissions	
	Total Implementation & Configuration	\$5,400.00
Training	Admin Training	\$900.00
	Admin Decision Support Training	\$1,800.00
	End User Training	\$900.00
	Total Training	\$3,600.00
Total Implementation Costs		\$10,800.00



Project Budget (Maintenance Module)

Implementation & Professional Services		Amount
Project Management	Needs Assessment, Kickoff Meeting, Project Planning, Schedules, Status Reports, Update Meetings, Issues and Go-Live Planning	\$3,600.00
	Total Project Management	\$3,600.00
Implementation & Configuration	Service Requests	\$30,600.00
	Work Orders	
	Workflow Process Control	
	Customers and Properties	
	Preventative & Scheduled Maintenance [up to 100]	
	Workflow Notifications	
	Testing – AT, System, Test Cases/Scenarios	
	Go-Live Support	
	Total Implementation & Configuration	\$30,600.00
Training	Division Admin Training	\$5,400.00
	Core Sys Maintenance Admin Training	\$5,400.00
	End User and Mobile Training	\$3,600.00
	Total Training	\$14,400.00
Total Implementation Costs		\$48,600.00



Value Added Features & Services

Value Added Services	In Scope	Implementation	Annual Fee
Citywide Core			
GIS Integration (WMS) - Automatic (PW Assets)	✓	\$3,600.00	Included
Field Mapper Setup and Configuration [ArcGIS Customization]	✓	\$5,400.00	Included
Single Sign-on (SSO) Integration (PW Team only)	✓	\$1,800.00	\$1,500.00
Additional Data Storage (XGB)	✗	N/A	N/A
StreetSaver (Initial Data Sync, and CSV Sync Training)	✓	Included	Included
WinCams Integration – Labor (Setup and Documentation)	✓	\$3,600.00	\$4,000.00
API Training (Support Client lead MC uConnect Integration)	✗	N/A	N/A
30/60/90 Day Reviews	Included	Included	Included
Assets Module			
Citywide Asset Collector (PW License only)	✓	Included	\$1,000.00
Asset Profiles (Up to 5) – Configure Current Processes for Condition, Risk, Lifecycle to drive Capital Planning needs.	✓	\$3,600.00	N/A
Condition Calculator Configured (X Formulas)	✗	N/A	N/A
Financial Balancing (GSAB)	✗	N/A	N/A
Image File Upload (PW Assets)	✓	\$1,800.00	N/A
Maintenance Module			
Citywide Customer Portal	✓	\$3,600.00	\$10,000.00
Route Patrol	✗	Out of scope	Included
Staff Request Portal (Internal)	✗	N/A	N/A
Customized Address Search	✗	N/A	N/A
Legacy Data Import – Bulk Files & Attachments	✓	\$3,600.00	N/A
Legacy Data Import – SR & WO (Standalone table)	✗	N/A	N/A



General Terms and Conditions

- Consulting rates are as follows:
 - \$1,800 / day or \$225.00 / hour – a day includes 8 hours of services.
 - Requests for additional consulting services may be made via e-mail or a purchase order from an authorized representative of the Client. This will serve as authorization to perform and invoice the service.
 - Consulting rates are valid for the term of this agreement only.
- During the provision of the implementation services and for 1 year afterward, customers shall not hire PSD employees or subcontractors involved in the delivery of the services
- PSD Citywide (US) Inc. warrants that the professional services shall be performed by its employees or subcontractors in a manner conforming to generally accepted industry standards and practices. No other warranties, expressed or implied, are made with respect to the services or goods to be supplied by PSD Citywide (US) Inc. hereunder, including, without limitation, any implied warranty of merchantability or fitness for a particular purpose.
- The liability of either party to the other or to any third party for any claim of any kind arising out of this Purchase Agreement is limited to monetary damages, and the aggregate amount of such liability for all claims of any kind relating to any product or service is limited to the fees paid to PSD Citywide (US) Inc. under this Agreement for the product or service which gave rise to the claim. Under no circumstances shall PSD Citywide (US) Inc. be liable to customer or any third party for indirect, incidental, special or consequential damages, or damages for loss of profits, revenue, data or use, even if PSD Citywide (US) Inc. has been advised of the possibility of such damages.

Terms of Payment

- Implementation Professional Services will be invoiced in **8 equal monthly** amounts beginning after the kick-off meeting. The final invoice will be issued upon project sign-off.
- Software Licenses will be invoiced 30 days following the execution of this agreement by both parties.
- Annual Version Protection & Maintenance will be invoiced 90 days following the kick-off meeting of this project. Subsequent year's maintenance will be invoiced annually from that date. Annual Version Protection & Maintenance will be limited to a maximum annual escalation of 5%.
- All amounts quoted are in USD dollars and will be invoiced as such. The Client shall be responsible for paying any applicable taxes.
- PSD expenses including mileage, accommodation, meals, and ground transportation are extra where applicable and will be billed at cost.
- Taxes are extra where applicable. Consulting rates are valid for the term of this agreement only.
- ~~The Client shall pay invoices within 30 days of receipt of the invoice. Any amounts unpaid after the due date shall be subject to a late charge of 2% per month.~~
- The Client shall direct all PO information or invoice inquiries to finance@psdcitywide.com.

Additional Considerations

This document has been prepared specifically for the Client. This proposal and all its associated pricing shall remain valid for 60 calendar days from the date of issue.



Ownership and Confidentiality

All Client data stored within the Citywide applications remains the legal ownership of the Client and can be extracted and used without restriction. PSD shall treat as confidential all information obtained by PSD for and from the Client as well as all information compiled by PSD under this Agreement for the Client, including without limitation: business and marketing information, technical data, programs, source codes and other software, plans and projections.

Security

PSD performs regular security audits of our systems to ensure current updates and patches are applied on all hardware, along with updated antivirus software. All users are forced to use secure passwords which are stored on the server only in encrypted format. Nightly backups are done off-site. The PSD Firewall is configured to only allow traffic to enter the network for required services such as our web server.



Authorization

This contract shall be deemed to have come into force when executed by representatives authorized to bind the respective corporations: **Client** and PSD Citywide (US) Inc.

Terms and Assumptions Accepted Between:

County of Monterey

**The Public Works, Facilities, and
Parks Department**

1441 Schilling Place, 2nd floor

Salinas, CA 93901

By: _____

(Print Name)

(Signature)

(Date)

By: _____

(Print Name)

(Signature)

(Date)

PSD Citywide (US) Inc.

400 Continental Blvd.

El Segundo, California, 90245

By: _____

(Print Name)

(Signature)

(Date)

Additional Information Required to be Completed by Customer

Does your organization require a purchase order (PO) before issuing payment?

No ☐

Yes - The PO# for this order is: _____

All PSD Citywide Invoices be Directed to:

Accounts Payable Contact: _____

Telephone: _____

Email Address: _____

Billing Address: _____



Appendix A – Assets Definitions

Asset Collector: Activation of and training on the mobile app to allow the client to collect point data in the field as well as to update key asset information like attributes and condition.

Finance Integration: Ability to interface with other client systems (i.e. Great Plains) by providing the functionality to export transactions from Citywide into standard formats (e.g., csv, xlsx) and data fields.

Citywide API: Application Programming Interface in the form of a web service allows the ability to interface Citywide with other software systems to import or extract data elements. Setup and documentation provided, client responsible for programming and automating.

Legacy Data Import (Files/Attachments): Ability to import standard format files/attachments (ex. pdf, doc) related to assets from other client systems into Citywide specifically adhering to the Citywide data model and workflow.

Single Sign-On (SSO): Ability to authenticate using the client's identity provider and protocol to automatically log users into Citywide web and mobile.

Citywide GIS Viewer: Allows users to visualize and join spatial information to various Citywide modules (ex. Assets, Permitting, Maintenance Manager, etc.) to aid in decision making processes.

Citywide GIS/Client GIS Integration: Ability to read from the client's enterprise GIS system (i.e. hosted web map/feature services) and display spatial data within the Citywide GIS Viewer.

Post-Implementation 30-60-90 Day Reviews: A personalized support service designed to keep Citywide running smoothly. Benefit from scheduled 30, 60, and 90-day check-ins where our experts conduct comprehensive database reviews and provide tailored recommendations, ensuring your continued success with the system. Involves 3 pre-scheduled 1-hour client meetings at 30, 60, 90 days.

Implementation & Configuration (Data Import): Client must provide data in an excel file. PSD will review the available information in the client's asset listing and suggest classifications based on available data. Some concessions may need to be made to account for client reporting requirements. For example, if PSD suggests an industry standard classification listing but the client has been financially reporting otherwise, they may require additional asset classifications as well.

When the asset listing has been confirmed, PSD will move the initial dataset into the software via the Upload Centre. Additionally, PSD will perform a Quality Assurance check on the data to ensure all the attributes, assets and asset information from the spreadsheet has been moved into the system without anything missing, incorrect or duplicated data.



Financial Balancing: Once the client asset listing is uploaded, PSD Citywide will provide the client with an export that includes a side-by-side comparison of their previously reported financial numbers (closing balances) and the amortization numbers Citywide is generating from the amortization schedule. This list will include:

Citywide Asset ID	Closing NBV - Citywide
Any client financial ID	Closing NBV - Client
Asset Name	Amortization Expense - Citywide
Asset Category	Amortization Expense - Client
Asset Segment	Notes on what may be causing issues
In-Service Date	Columns identifying differences in numbers and potential forecasted changes (i.e.: changes in EUL or In-Service date that would help the asset balance, number of months the asset is off by amortization)
Estimated Useful Life	
Closing Accumulated Amortization - Citywide	
Closing Accumulated Amortization - Client	
Closing Cost - Citywide	
Closing Cost - Client	

PSD Citywide will not be responsible for:

- In-depth review asset-by-asset with the client or the auditor to resolve balancing differences.
- Matching financial adjustments provided by the client that do not align to assets.
- Once the client has completed their review, PSD Citywide will update any in-service dates, EUL's, additions, disposals, etc. so that the listing balances to the best of our ability. Overrides may be used, with client approval within certain situations (i.e.: penny-balancing or an auditor-approved historical issue). PSD will provide a list of all overrides to the client for approval.

Appendix B - Maintenance Definitions

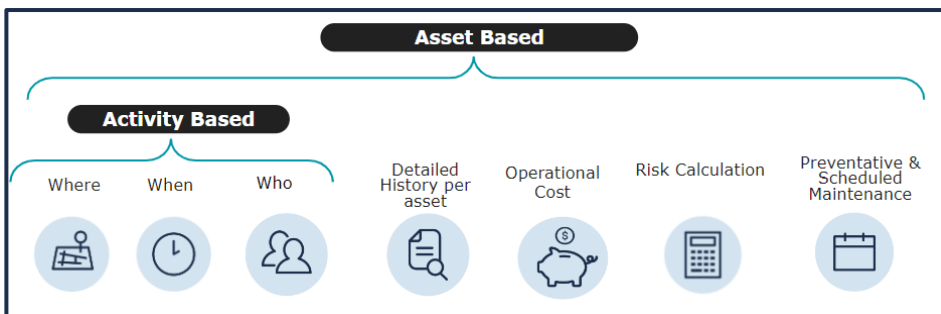
Pre-Implementation Needs Analysis: Involves assessing the specific detailed client requirements and constraints to ensure goals and project activities are focused on the clearly defined objectives of the project.

Customers & Properties (Upload existing data):

Involves the import of customers & properties data from 3rd party system

Activity Based Work Orders: Involves the ability to create work orders without connecting them to Assets. This allows you to record key details such as where, when, what and who completed work.

Asset Based Work Orders: Takes the WO functionality to the next level, where in addition to Activity based functionality, you will also be able to track a detailed history of activity per asset, operational Costs per Asset. You can also utilize Operational activity costs or occurrences as risk calculation factors. Preventative or Scheduled Maintenance Work Orders also fall under the Asset Based Work Orders category.



Inspection Work Orders: Involves the ability to identify and record custom pass/fail inspection criteria which will result in an inspection result of pass or fail.

Process Checklists: Involves the ability to create custom checklists and procedures associated to Work Orders & Inspections and can be made optional or mandatory before completion of the work order.

Workflow Notifications: This will involve the configuration of custom notification rules, based on specific workflow notification requirements, to ensure email notifications are going to the right person at the right time, in response to custom date or status triggers.

Sandbox for Training & Testing: A sandbox database will be available for the duration of the project for configuration testing and training. Configuration transfer will take place to move final signed off configuration for the Sandbox to the Production environment ahead of client go live

Training Only: When the "Training Only" option is selected, the functionality is available for client use but is not included in the implementation or support of the project. Training will be provided in a demo database to enable the client to use this functionality independently in the future, but it will not be customized to the client's specific environment.



Finance Integration: Ability to interface with other client systems (i.e. Great Plains) by providing the functionality to export transactions from Citywide into standard formats (e.g., csv, xlsx) and data fields.

Citywide API: Application Programming Interface in the form of a web service allows the ability to interface Citywide with other software systems to import or extract data elements. Setup and documentation provided, client responsible for programming and automating.

Citywide Customer Portal: Ability for applicants to create an account with the client and submit applications electronically into Citywide for staff review and processing.

Citywide GIS Viewer: Allows users to visualize and join spatial information to various Citywide modules (ex. Assets, Permitting, Maintenance Manager, etc.) to aid in decision making processes.

Citywide GIS/Client GIS Integration: Ability to read from the client's enterprise GIS system (i.e. hosted web map/feature services) and display spatial data within the Citywide GIS Viewer.

Asset Collector via Mobile App: For Maintenance implementation this add on is required if users will need the ability to download and interact with assets while in the field for such activity as adding an asset to a work order, creating a work order from an asset, or clicking on an asset linked to a work order to view further asset details.

Legacy Data Import (Files/Attachments): Ability to import standard format files/attachments (ex. pdf, doc) of completed applications, permits, or licenses from other client systems into Citywide specifically adhering to the Citywide data model and workflow.

Customer and Property Data Maintenance Service: A pre-paid service allowing the client to send data directly to PSD for processing and importing into Citywide following an agreed upon interval (ex. monthly, quarterly).

Single Sign-On (SSO): Ability to authenticate using the client's identity provider and protocol to automatically log users into Citywide web and mobile.

Test Database (Sandbox): A secondary Citywide database (copy of production) that allows the client to test new features/functions and execute training programs within their organization.

Custom Address Search: Ability to use client data or service to geocode address searching within the Citywide GIS Viewer.

Post-Implementation 30-60-90 Day Reviews: A personalized support service designed to keep Citywide running smoothly. Benefit from scheduled 30, 60, and 90-day check-ins where our experts conduct comprehensive database reviews and provide tailored recommendations, ensuring your continued success with the system. Involves 3 pre-scheduled 1-hour client meetings at 30, 60, 90 days.

EXHIBIT E

**To Agreement by and between
County of Monterey, hereinafter referred to as “County”
AND
PSD Citywide (US) Inc., hereinafter referred to as “CONTRACTOR”
Additional Terms**

1. **Order of Precedence.** In the event of any conflict or inconsistency among the terms and conditions of this Agreement and its incorporated documents, the order of precedence shall be as follows:
 - a. First, County’s Standard Agreement;
 - b. Second, Exhibit A – Scope of Services / Payment Provisions;
 - c. Third, Exhibit B – Assignment and Subcontracting;
 - d. Fourth, Exhibit C – PSD Citywide Proposal in Response to RFP #10936;
 - e. Fifth, Exhibit D – PSD Citywide Proposal for Services for Public Works Division; and
 - f. Sixth, Exhibit E – Additional Terms.
2. **Definitions:**
 - a. **“Aggregated Statistics”** means data and information related to Customer’s use of the Services that is used by PSD Citywide in an aggregate and anonymized manner, including to compile statistical and performance information related to the provision and operation of the Services.
 - b. **“Authorized User”** means Customer’s employees, consultants, contractors, and agents (i) who are authorized by Customer to access and use the Services under the rights granted to Customer pursuant to this Agreement and (ii) for whom access to the Services has been purchased hereunder.
 - c. **“Customer Data”** means, other than Aggregated Statistics, information, data, and other content, in any form or medium, that is submitted, posted, or otherwise transmitted by or on behalf of Customer or an Authorized User through the Services.
 - d. **“PSD Citywide IP”** or **“CONTRACTOR IP”** means the Services, the Documentation, and any and all intellectual property provided to Customer or any Authorized User in connection with the foregoing. For the avoidance of doubt, PSD Citywide IP includes Aggregated Statistics and any information, data, or other content derived from PSD Citywide’s monitoring of Customer’s access to or use of the Services, but does not include Customer Data.

- e. **“Services”** means the SaaS offering as described in this Agreement between the County and CONTRACTOR. In addition to ongoing SaaS services, the Services may include implementation services to initiate and integrate the SaaS services for the Customer and consulting services. Additional Services may be added from time to time by the parties through amendments to this Agreement.

3. Access and Use:

- a. **Provision of Access.** Subject to terms and conditions of this Agreement, CONTRACTOR hereby grants County a non-exclusive, non-transferable right to access and use the Services during the term of this Agreement, solely for use by Authorized Users in accordance with the terms and conditions herein. Such use is limited to County’s Authorized User use. CONTRACTOR will ensure SaaS technology supports Single Sign On (SSO) and Multi factor authentication (MFA), and allow County’s ITD to set up a group with those that County ITD needs to access the SaaS cloud tool. CONTRACTOR shall provide to County the necessary passwords and network links or connections to allow County to access the Services subject to Section 5 (Security). The total number of Authorized Users will not exceed the number set forth in Exhibit A – Section II. Payment Provisions , except as expressly agreed to in writing by the CONTRACTOR and County and subject to any appropriate adjustment of the Fees payable hereunder.
- b. **Documentation License.** Subject to the terms and conditions contained in this Agreement, CONTRACTOR hereby grants to County a non-exclusive, non-sublicensable, non-transferable license to use the Documentation during the term of this Agreement solely for County’s internal business purposes in connection with its use of the Services. Licenses shall be assigned to the County as an organization and may be used by any of its authorized employees, agents, or contractors. County may reassign licenses to replacement personnel as needed. County shall have the right to retain copies of the Documentation after termination or expiration of this Agreement for recordkeeping, audit, training, and compliance purposes.
- c. **Use Restrictions.** The County will not: (a) reproduce, sell, rent, assign, lease, sublicense, distribute, pledge, serve third parties, market or commercially exploit, in any way, except as provided in this Agreement the Services or any component thereof; (b) use the Services to process data for other parties or for any purpose or function whatsoever other than for its own internal use; (c) use the Services except as authorized herein; (d) remove, modify or obscure any copyright, trademark or other proprietary rights notices that appear during use of any Services; (e) reverse engineer, decompile, disassemble or create derivative works from the Service or any software that is part of the Service; or (f) use the Services for activities that are illegal or unethical.
- d. **Reservation of Rights.** CONTRACTOR reserves all rights not expressly granted to County in this Agreement. Except for the limited rights and licenses expressly granted under this Agreement, nothing in this Agreement grants, by implication, waiver, estoppel, or otherwise, to County or any third party any intellectual property rights or other right, title, or interest in or to the CONTRACTOR IP.

- e. **Suspension.** Notwithstanding anything to the contrary in this Agreement, CONTRACTOR may temporarily suspend County's and any Authorized User's access to any portion or all of the Services if: (i) CONTRACTOR reasonably determines that (A) there is a threat to or attack on any of the CONTRACTOR IP; (B) County's or any Authorized User's use of the PSD Citywide IP disrupts or poses a security risk to the CONTRACTOR IP or to any other customer or vendor of CONTRACTOR; (C) County, or any Authorized User, is using the CONTRACTOR IP for fraudulent or illegal activities, or activities outside of County's ordinary course of business; (D) subject to applicable law, County has ceased to continue its business in the ordinary course, made an assignment for the benefit of creditors or similar disposition of its assets, or become the subject of any bankruptcy, reorganization, liquidation, dissolution, or similar proceeding; or (E) CONTRACTOR's provision of the Services to County or any Authorized User is prohibited by applicable law; (ii) any vendor of CONTRACTOR has suspended or terminated CONTRACTOR's access to or use of any third-party services or products required to enable County to access the Services; CONTRACTOR shall use commercially reasonable efforts to provide written notice of any Service Suspension to County and to provide updates regarding resumption of access to the Services following any Service Suspension. CONTRACTOR shall use commercially reasonable efforts to resume providing access to the Services as soon as reasonably possible after the event giving rise to the Service Suspension is cured. CONTRACTOR will have no liability for any damage, liabilities, losses (including any loss of data or profits), or any other consequences that County or any Authorized User may incur as a result of a Service Suspension.
- f. **Aggregated Statistics.** CONTRACTOR may monitor County's use of the Services and collect and compile Aggregated Statistics based on County Data input into the Services and other sources. As between CONTRACTOR and Customer, all right, title, and interest in Aggregated Statistics, and all intellectual property rights therein, belong to and are retained solely by CONTRACTOR. County agrees that CONTRACTOR may use Aggregated Statistics to the extent and in the manner permitted under applicable law; provided that such Aggregated Statistics do not identify County or County's Confidential Information. The CONTRACTOR shall treat as confidential all information received from the COUNTY in connection with this Agreement and shall not disclose such information to any third party without the COUNTY's prior written consent, except as may be required by law. The CONTRACTOR's confidentiality obligations shall survive the termination or expiration of this Agreement.

4. **Service Levels and Support:**

- a. **Service Levels.** Subject to the terms and conditions of this Agreement, CONTRACTOR will provide support ("Support") for the Services as described on the CONTRACTOR Support Schedule, TableD-1 below).
 - b. **Support.** The access rights granted hereunder entitle County to the Support described in Table D-1 for the term of the Agreement.
5. **Security:** Logon ID's, passwords or other authentication are required to access the Services. It is the County's responsibility to protect that information, including without limitation, to use effective passwords that are not easily guessed or discoverable, and not share them with others.

Exhibit E – Additional Terms

PSD Citywide (US) Inc.

CMMS Software and Implementation (RFP #10936)

Public Works, Facilities and Parks

CONTRACTOR shall keep access logs for a minimum of 90 days and ensure the logs are available to County, including Information Technology Department's staff. CONTRACTOR shall ensure traffic set up is https/ssl only and that the data in the cloud must be encrypted at rest with a minimum of sha256. CONTRACTOR shall ensure SaaS technology supports Single Sign On (SSO) and Multi factor authentication (MFA), and allow County's ITD to set up a group with those that County ITD needs to access the SaaS cloud tool. The County is responsible for all activity carried on under its account.

In the event of any suspected unauthorized use of the Services, or any suspected breach of security, including loss, theft, or unauthorized disclosure of password information, the County will notify CONTRACTOR immediately. In the event of a breach of security, the County will remain liable for any unauthorized use of the online Services until it notifies CONTRACTOR of such breach. Where CONTRACTOR discovers or has reason to expect that a privacy breach/incident, or any other breach of security has occurred, CONTRACTOR will document and contain the breach and notify the County in writing as promptly as possible.

6. Intellectual Property Ownership; Feedback.

- a. **CONTRACTOR IP.** County acknowledges that, as between County and CONTRACTOR, CONTRACTOR owns all right, title, and interest, including all intellectual property rights, in and to the CONTRACTOR IP.
- b. **County's Data.** CONTRACTOR acknowledges that, as between CONTRACTOR and County, County owns all right, title, and interest, including all intellectual property rights, in and to the County Data. County hereby grants to CONTRACTOR a non-exclusive, royalty-free, worldwide license to reproduce, distribute, and otherwise use and display the County Data and perform all acts with respect to the County Data as may be necessary for CONTRACTOR to provide the Services to County, and a non-exclusive, perpetual, irrevocable, royalty-free, worldwide license to reproduce, distribute, modify, and otherwise use and display County Data incorporated within the Aggregated Statistics. In the event of any actual or suspected data breach, the CONTRACTOR shall promptly notify the County in writing and cooperate fully to mitigate any adverse effects. The CONTRACTOR shall ensure that any subcontractors engaged in processing personal data are bound by equivalent obligations. Upon termination of the Services, the County will have 90 days to obtain its Data as may be stored by CONTRACTOR subject to the provision of Service, after which CONTRACTOR will delete it, notwithstanding Agreement's Section 10.03 – Maintenance of Records Provision requirements. Notwithstanding the forgoing, CONTRACTOR may retain a copy of County Data subject to its record retention policies.
- c. **Feedback.** If County or any of its employees or contractors sends or transmits any communications or materials to CONTRACTOR by mail, email, telephone, or otherwise, suggesting or recommending changes to the PSD Citywide IP, including without limitation, new features or functionality relating thereto, or any comments, questions, suggestions, or the like ("Feedback"), CONTRACTOR is free to use such Feedback irrespective of any other obligation or limitation between the County and CONTRACTOR governing such Feedback. County hereby assigns to CONTRACTOR on County's behalf, and on behalf of its employees, contractors and/or agents, all right, title, and interest in, and CONTRACTOR is free to use without any attribution or

Exhibit E – Additional Terms

PSD Citywide (US) Inc.

CMMS Software and Implementation (RFP #10936)

Public Works, Facilities and Parks

compensation to any party, any ideas, know-how, concepts, techniques, or other intellectual property rights contained in the Feedback, for any purpose whatsoever, although CONTRACTOR is not required to use any Feedback.

7. **Updates:** The online SaaS Services will be updated by CONTRACTOR from time to time in its sole discretion at no additional cost to the extent it provides such updates to its customers generally, provided that the Services are not materially downgraded by doing so. Additional features may be made available from time to time for an additional cost. The County is entitled to receive all new versions and upgrades of Citywide Software licenses in this Agreement free of charge as well as service packs issued promptly to fix problems reported by customers and deliver minor functionality and performance improvements.
8. **County's Responsibility:** County is responsible and liable for all uses of the Services and Documentation resulting from access provided or enabled by County, directly or indirectly, whether such access or use is permitted by or in violation of this Agreement. Without limiting the generality of the foregoing, County is responsible for all acts and omissions of Authorized Users or any third party that gains access to the Services or Documentation through County or an Authorized User, and any act or omission by an Authorized User that would constitute a breach of this Agreement if taken by County will be deemed a breach of this Agreement by County. Any act or omission by an Authorized User within the scope of County's reasonable policies and controls shall not be deemed a breach of this Agreement by County unless County knew of the violation and failed to take commercially reasonable corrective action. County shall use reasonable efforts to make all Authorized Users aware of this Agreement's provisions as applicable to such Authorized User's use of the Services, and shall cause Authorized Users to comply with such provisions. County shall not be responsible or liable for any unauthorized access to or use of the Services or Documentation that results from Vendor's failure to implement and maintain commercially reasonable security measures.
9. **Service Levels:** CONTRACTOR shall use commercially reasonable efforts to maintain availability of the Services on a continuous basis, with minimum availability targets to be mutually agreed in writing. Contractor shall provide County with advance notice of any scheduled maintenance, which shall, to the extent practicable, be performed during non-peak hours and shall not exceed agreed maintenance windows.

If CONTRACTOR, in its sole discretion, deems the County to be adversely affecting online Service performance, then CONTRACTOR may suspend the online Services to County until the problem is rectified. CONTRACTOR shall not suspend the Services except (i) to address an imminent security threat, (ii) to perform scheduled maintenance for which reasonable advance notice has been provided to County, or (iii) where County has materially breached this Agreement and failed to cure such breach within a reasonable cure period after written notice. In no event shall CONTRACTOR suspend the Services solely on the basis of performance issues allegedly caused by County without first (a) providing County with written notice describing the issue in reasonable detail, and (b) giving County a reasonable opportunity to resolve the issue in good faith cooperation with CONTRACTOR.

10. Limited Warranty and Warranty Disclaimer.

- a. CONTRACTOR warrants that the Services will conform in all material respects to the service levels set forth in Table D-1, when accessed and used in accordance with this Agreement.. CONTRACTOR further warrants that the Services will be free from material defects in functionality, security, and performance. CONTRACTOR does not make any representations or guarantees regarding uptime or availability of the Services unless specifically identified in this agreement (see Exhibit B – RFP #10936 Proposal Page 25 - “Data and Servers”) . The remedies set forth in Table D-1 are County’s primary remedies. The remedies set forth in Table D-1 are not County’s sole and exclusive remedies; County shall also be entitled to pursue any other remedies available at law, in equity, or under this Agreement for breach of warranty.
- b. Except as expressly provided in this Agreement, the Services are delivered ‘AS IS.’ Contractor does not disclaim, and expressly affirms, the warranties in Section 10(a), and further warrants that the Services: (i) will conform to generally accepted industry practices; (ii) will be free from material harmful code; and (iii) will comply with applicable laws, regulations, and security standards.

11. Indemnification.

- a. Contractor shall indemnify, defend, and hold harmless County, its officers, employees, and agents from and against any and all claims, damages, liabilities, costs, and expenses (including reasonable attorneys’ fees) arising out of or related to any third-party claim that the Services, as provided by Contractor, infringe or misappropriate any intellectual property right (“Third-Party Claim”), except to the extent such claim results solely from (A) use of the Services with unauthorized data, software, hardware, or technology, or (B) modifications not made or approved by Contractor.
- b. If a Third-Party Claim is made or likely, Contractor shall, at its expense and in consultation with County, use commercially reasonable efforts to (i) modify or replace the Services to be non-infringing without material loss of functionality, or (ii) secure County’s continued right to use the Services. If neither option is reasonably available, Contractor may terminate the affected Services with at least 90 days’ written notice (or earlier if legally required), provided that Contractor shall (a) refund to County any prepaid fees on a prorated basis, (b) reimburse County for all reasonable, documented transition costs, including costs of procuring replacement services, and (c) remain responsible for indemnifying County for any Third-Party Claims arising prior to termination.
- c. County shall have the right, at its own expense, to participate in the defense of any claim covered by Contractor’s indemnification obligations. Contractor may not settle any Third-Party Claim in a manner that imposes liability or admission of fault on County without County’s prior written consent.
- d. The indemnification obligations of this Section shall survive termination or expiration of this Agreement.

- e. CONTRACTOR's obligations under this Section do not apply to claims arising solely from (A) use of the Services with unauthorized data, software, hardware, or technology, or (B) modifications not made or approved by CONTRACTOR. However, CONTRACTOR remains responsible for claims that could have been avoided through the use of industry-standard, non-infringing technology.

12. **Privacy policy/understanding:** CONTRACTOR and County will treat any personal information in the possession of the other that they may have access to under this Agreement as required under applicable privacy legislation and each party's own privacy policy as it exists from time-to-time. Neither CONTRACTOR or County will use or disclose such personal information in any way except pursuant to the other's instructions or to the extent necessary to perform this Agreement. CONTRACTOR will use security measures adequate to the sensitivity of the personal information to protect personal information. If CONTRACTOR subcontracts any part of its obligations hereunder it will obtain contractual obligations similar to this section from the subcontractor.
13. **Survival:** The provisions of this Agreement pertaining to Confidential Information, privacy, and non-solicitation will survive the termination of this Agreement. Other sections pertaining to rights and obligations which by their nature should survive termination are hereby confirmed to so survive.
14. **Force Majeure:** In no event shall CONTRACTOR be liable to County, or be deemed to have breached this Agreement, for any failure or delay in performing its obligations under this Agreement, if and to the extent such failure or delay is caused by any circumstances beyond CONTRACTOR's reasonable control, including but not limited to acts of God, flood, fire, earthquake, explosion, pandemic, war, terrorism, invasion, riot or other civil unrest, strikes, labor stoppages or slowdowns or other industrial disturbances, or passage of law or any action taken by a governmental or public authority, including imposing an embargo.
15. **Severability.** If any provision of this Agreement is invalid, illegal, or unenforceable in any jurisdiction, such invalidity, illegality, or unenforceability will not affect any other term or provision of this Agreement or invalidate or render unenforceable such term or provision in any other jurisdiction. Upon such determination that any term or other provision is invalid, illegal, or unenforceable, the CONTRACTOR and County shall negotiate in good faith to modify this Agreement so as to effect their original intent as closely as possible in a mutually acceptable manner in order that the transactions contemplated hereby be consummated as originally contemplated to the greatest extent possible.
16. **Export Regulation.** County shall comply with all applicable federal laws, regulations, and rules, and complete all required undertakings (including obtaining any necessary export license or other governmental approval), that prohibit or restrict the export or re-export of the Services or any Customer Data outside the US.

CONTRACTOR RESPONSIBILITIES

The CONTRACTOR shall:

Provide support to the County for the Services as defined within the Table D-1 above and correct and resolve any errors;

Ensure on a best effort basis that the Services, and each part or component thereof, will operate and function without error following the introduction of all updates provided by the CONTRACTOR;

Ensure on a best effort basis that the Services will operate and function without error on any updates, repairs, replacements or fixes including, without limitation, software patches or bug fixes;

Ensure on a best effort basis that the Services will operate and function without error on new releases of any CONTRACTOR supplied proprietary tools and components in, or used for, the Services and shall provide the County with reasonable prior written notice of any planned changes or modifications to all such tools and components;

COUNTY RESPONSIBILITIES

The County shall:

Provide all necessary information and assistance requested by CONTRACTOR to understand and describe an error in order to allow the CONTRACTOR to carry out its duties.

Make all requests for support through the “PSD Citywide” support portal. County shall provide a detailed description of the issue, steps to replicate the problem and other assistance as requested by the CONTRACTOR.

The County shall advise the CONTRACTOR of any changes to their business requirements that may necessitate a review or modification of the CONTRACTOR’s services.

The County will notify CONTRACTOR of any planned, scheduled outages or changes to their environment by notifying CONTRACTOR at least 14 business days in advance. The County is responsible for providing all relevant details of changes within the notification and also perform their own integration testing.

Table D-1: Support Schedule

This schedule sets out support levels provided by CONTRACTOR for its SaaS products. This schedule is subject to the terms of the SaaS Agreement to which it is attached. CONTRACTOR supports its SaaS products in a number of ways, including in product help, and support web pages. If the Customer must contact CONTRACTOR for support, CONTRACTOR will do so based on the metrics below.

Error Classification / Description for reporting to VENDOR	Description & Target Action(s) & Target Response Times from VENDOR
CRITICAL System cannot run. A time critical user job is stopped and affecting a significant number of users.	Response Time: Within 4 hours from the time CONTRACTOR is notified of the Error (for Critical Errors first occurring during business hours 8:00AM to 8:00PM EST) Target Resolution Time: Every attempt is made by CONTRACTOR to resolve the Error within <u>1 working day</u>
HIGH PRIORITY An important operational user job is stopped. A time critical user job is at risk of stopping or malfunctioning; an important function of the System is malfunctioning.	Response Time: Within 8 hours from the time CONTRACTOR is notified of the Error (for High Priority Errors first occurring during business hours 8:00AM to 8:00PM EST) Target Resolution Time: Every attempt is to be made by CONTRACTOR to resolve the Error within <u>2 working days</u> .
MEDIUM A non-urgent job is not executable. System malfunction has infrequent or minor user impact.	Response Time: Within 2 working days from the time CONTRACTOR is notified of the Error (for Medium Priority Errors first occurring during business hours 8:00AM to 8:00PM EST) Target Resolution Time: Every attempt is to be made by CONTRACTOR to resolve the Error within <u>3 working days</u>
LOW The Error has no current impact on any end user. There is a locally identified cure or workaround available.	Response Time: Within 3 – 5 working days from the time CONTRACTOR is notified of the Error (for Low Priority Errors first occurring during business hours 8:00AM to 8:00PM EST) Target Resolution Time: Every attempt is to be made by CONTRACTOR to resolve the Error on a best effort basis.



Certificate of Insurance

No.: 2025-25-REV-1

Dated: August 13, 2025

This document supersedes any certificate previously issued under this number

This is to certify that the Policy(ies) of insurance listed below ("Policy" or "Policies") have been issued to the Named Insured identified below for the policy period(s) indicated. This certificate is issued as a matter of information only and confers no rights upon the Certificate Holder named below other than those provided by the Policy(ies).

Notwithstanding any requirement, term, or condition of any contract or any other document with respect to which this certificate may be issued or may pertain, the insurance afforded by the Policy(ies) is subject to all the terms, conditions, and exclusions of such Policy(ies). This certificate does not amend, extend, or alter the coverage afforded by the Policy(ies). Limits shown are intended to address contractual obligations of the Named Insured.

Limits may have been reduced since Policy effective date(s) as a result of a claim or claims.

Certificate Holder: County of Monterey 1441 Schilling Place South 2nd Floor Salinas, CA 93901 Attn.: , Public Works, Facilities and Parks Department	Named Insured and Address: PSD CITYWIDE (US) INC. 148 Fullarton Street London, ON N6A 5P3
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This certificate is issued regarding:

Evidence of Insurance

Type(s) of Insurance	Insurer(s)	Policy Number(s)	Effective/Expiry Dates	Sums Insured Or Limits of Liability	
COMMERCIAL GENERAL LIABILITY • Personal Injury • Broad Form Property Damage • Contractual Liability • Waiver of subrogation (only when required by contract)	Lloyd's Underwriters	W20854225A	Apr 17, 2025 to Apr 17, 2026	Bodily Injury and Property Damage Liability	CDN 1,500,000
				Products & Completed Operations Aggregate	CDN 1,500,000
				Non - Owned Auto	CDN 2,000,000
				Employers Liability	CDN 2,000,000 Bodily Injury Liability - Canadian Employees only
				General Aggregate	CDN 5,000,000
ERRORS & OMISSIONS • Independent Contractor Coverage Extension • Waiver of subrogation (only when required by contract)	Lloyd's Underwriters	W20854225A	Apr 17, 2025 to Apr 17, 2026	Limit of Liability	CDN 1,500,000 Professional & Technology Based Services
				Aggregate	CDN 3,000,000

Additional Information:

The County of Monterey, its officers, agents, and employees are added as an Additional Insured under the Commercial General Liability policy but only with respect to liability arising out of the operations of the Named Insured.

The above-noted Commercial General Liability will apply as primary and non-contributory, where required by contract.

Notice of cancellation:

The insurer(s) affording coverage under the policies described herein will not notify the certificate holder named herein of the cancellation of such coverage.

Marsh Canada Limited 120 Bremner Boulevard Suite 800 Toronto, ON M5J 0A8 SMECertificateRequest@marsh.com	Marsh Canada Limited  By: _____ Trisha Sirju
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CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
08/19/2025

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Marsh Affinity a division of Marsh USA LLC. PO BOX 14404 Des Moines, IA 50306-9686	CONTACT NAME: Marsh Affinity PHONE (A/C, No, Ext): 800-743-8130 FAX (A/C, No): E-MAIL ADDRESS: ADPTotalSource@marsh.com <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th style="width: 80%;">INSURER(S) AFFORDING COVERAGE</th> <th style="width: 20%;">NAIC #</th> </tr> <tr> <td>INSURER A : AIU Insurance Company</td> <td>19399</td> </tr> <tr> <td>INSURER B :</td> <td></td> </tr> <tr> <td>INSURER C :</td> <td></td> </tr> <tr> <td>INSURER D :</td> <td></td> </tr> <tr> <td>INSURER E :</td> <td></td> </tr> <tr> <td>INSURER F :</td> <td></td> </tr> </table>	INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A : AIU Insurance Company	19399	INSURER B :		INSURER C :		INSURER D :		INSURER E :		INSURER F :	
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INSURER D :															
INSURER E :															
INSURER F :															
INSURED ADP TotalSource CO XXII, Inc. 5800 Windward Parkway Alpharetta, GA 30005 U/C/F: PSD CITYWIDE US INC. 222 West Las Colinas Blvd Irving, TX 75039															

COVERAGES
CERTIFICATE NUMBER:
REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS																
	COMMERCIAL GENERAL LIABILITY ☐ CLAIMS-MADE ☐ OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: ☐ POLICY ☐ PRO JECT ☐ LOC ☐ OTHER:						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ \$																
	AUTOMOBILE LIABILITY ☐ ANY AUTO ☐ OWNED AUTOS ONLY ☐ SCHEDULED AUTOS ☐ HIRED AUTOS ONLY ☐ NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$																
	UMBRELLA LIAB ☐ OCCUR EXCESS LIAB ☐ CLAIMS-MADE ☐ DED ☐ RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$																
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y / N N	N/A	WC 063577116 CA	08/10/2025	07/01/2026	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 5%;">PER X</td> <td style="width: 15%;">STATUTE</td> <td style="width: 5%;">OTH-ER</td> <td style="width: 75%;"></td> </tr> <tr> <td></td> <td></td> <td></td> <td>E.L. EACH ACCIDENT \$ 2,000,000</td> </tr> <tr> <td></td> <td></td> <td></td> <td>E.L. DISEASE - EA EMPLOYEE \$ 2,000,000</td> </tr> <tr> <td></td> <td></td> <td></td> <td>E.L. DISEASE - POLICY LIMIT \$ 2,000,000</td> </tr> </table>	PER X	STATUTE	OTH-ER					E.L. EACH ACCIDENT \$ 2,000,000				E.L. DISEASE - EA EMPLOYEE \$ 2,000,000				E.L. DISEASE - POLICY LIMIT \$ 2,000,000
PER X	STATUTE	OTH-ER																					
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			E.L. DISEASE - EA EMPLOYEE \$ 2,000,000																				
			E.L. DISEASE - POLICY LIMIT \$ 2,000,000																				

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

All worksite employees working for PSD CITYWIDE US INC. paid under ADP TOTALSOURCE, INC.'s payroll, are covered under the above stated policy. Proprietor/Partner/Executive Officer/Member are not excluded as long as they are in the ADPTS payroll or have completed the SEI Participation Addendum.

CERTIFICATE HOLDER

County of Monterey
 c/o: Public Works, Facilities and Parks Department
 1441 Schilling Place, South
 2nd Floor
 Salinas,, CA 93901

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

Jo Phillips

ACORD 25 (2016/03)

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Additional Insured Waiver of Subrogation (including Primary and Non Contributory) Endorsement

This endorsement modifies the Commercial General Liability Policy (Occurrence) and shall be read as if incorporated within it.

Effective date: Per Policy Declaration

Policy Number: W208542-

In consideration of the premium charged for the Policy, it is hereby understood and agreed that the following person or entity is added as an Additional Insured under this policy but only to the extent the Insured would have been liable and coverage would have been afforded under the terms and conditions of this Policy had such **Action** been made against the Named Insured.

Additional Insured

County of Monterey, its officers, officials, employees, agents, and volunteers

Public Works, Facilities and Parks Department

1441 Schilling Place, South 2nd Floor

Salinas, CA 93901

-
- The above mentioned extension of coverage shall not apply to any **Action** which includes allegations or facts indicating actual or alleged independent or direct liability on the part of any such person or entity named above.

It is a condition precedent to liability under the above mentioned extension of coverage that such entity named above shall prove to the Insurers' satisfaction the extent of any **Action** arising out of the Insured's conduct as described above.

Notwithstanding the foregoing, where required by a written contract or agreement, coverage under this Policy shall qualify as primary and non contributory insurance to this Additional Insured but only if the Additional Insured becomes involved in a **Action** that does not contain any allegations of negligence on the part of the Additional Insured.

It is further understood and agreed that this policy does not apply to any other liability of the Additional Insured and this inclusion shall not serve to increase the Insurer's Limits of Liability.

Furthermore, the Insurer will endeavor to give this Additional Insured thirty (30) days written notice of cancellation should the Insurer cancel this policy however assumes no responsibility for failure to do so.

With respect to any claims or **Actions** under this policy, we agree to waive any rights of subrogation that we may have under this policy provided that:

- 1) The insured has waived such rights of subrogation in a contract or agreement entered with the Additional Insured prior to the **Occurrence**, and provided that;
- 2) This waiver shall apply in favour of the person or entity named above.

However, this waiver does not apply to any claims, **Actions**, loss, costs or defense expenses arising solely out of the negligence of the person or entity named above.

All other terms and conditions of this Policy remain unchanged.

A handwritten signature in black ink, appearing to read "H. Smith".

Signed on behalf of **Beazley Canada Ltd** acting on behalf of: **Beazley Syndicate 3623 at Lloyd's**

Beazley Canada Ltd

First Canadian Place
100 King Street West Suite 4530
Toronto, Ontario M5X 1E1
Canada
info@beazley.com
www.beazley.com