City of Fort Lauderdale

Enterprise Asset Management System

RFP No. 475-11780

STARBOARD CONSULTING

IBM Gold Business Partner™

June 6, 2017

2170 West State Road 434
Suite 124
Longwood, FL 32779

Phone: 407-622-6414
Fax: 407-622-6417
www.starboard-consulting.com

June 6, 2017

City of Fort Lauderdale Procurement Services Division
100 N. Andrews Avenue, #619
Fort Lauderdale, FL 33301

RE: RFP No. 475-11780 – Enterprise Asset Management System

Starboard Consulting, LLC (Starboard) is pleased to provide this response to the above referenced inquiry for an enterprise asset management system to support the City of Fort Lauderdale's Public Works Department.

Starboard is proposing that the City of Fort Lauderdale procure and implement IBM's industry-leading work and asset management system, IBM Maximo®. Maximo® meets or exceeds all the functional requirements stated in the RFP. Maximo® is easily configurable and scalable, thus preserving your ability to easily upgrade to future releases.

Maximo is used by more than 300 Utilities and public works around the world to manage a wide range of critical assets and supporting business processes including asset management, work management, maintenance management, inventory management, and supply chain management.

Maximo's extensive functional capabilities, coupled with one of the most flexible and stable architectures in the marketplace, will allow the City of Fort Lauderdale to achieve the desired benefits of a single state-of-the-art maintenance management application.

Starboard Consulting is an Orlando-based Women-Owned business, with over 20 years' experience implementing Maximo. Our key industries served include electric, water and wastewater utilities; city and county governments; public works agencies; transportation organizations; and higher education facilities. Starboard is proposing a highly-experienced team, made up of local professionals who live near and around Fort Lauderdale, key resources from our Orlando office, as well as other Starboard staff from other locales.

Starboard is an authorized reseller, implementer, and level 1, level 2 maintenance support provider for IBM Maximo®. Starboard is a GOLD-accredited, IBM Premier Business Partner. Our company retains IBM's highest rating amongst Maximo partners.

We are recognized as a leader in asset management, with applied excellence in technology that solves clients' real world problems. Our team of professionals brings industry knowledge, technical expertise, and a proven approach to all of our projects.

Starboard is proposing an 18-month implementation timeframe with a two-phase approach. Phase one is the pilot, which will be ready and available, using our quick start StarMax approach, within 3 months. Phase two will be completed within 15 months after completion of Phase 1.

Starboard's proposal offers a well thought out approach that has been successful in multiple prior implementations and upgrade projects. Starboard has a proud history of working with clients to achieve and promote the delivery of best practice asset management and technology solutions. The benefits offered to the City of Fort Lauderdale by Starboard are:

- **Highly Certified and Credentialed Team** – Starboard employees hold numerous accreditations in all levels of Maximo implementations as well as accreditations in Mobile technologies and most importantly certification as PMPs.
- **Proven Approach** – Starboard utilizes a proven implementation methodology that has been successful on many similar maintenance and asset management implementation projects and upgrades.
- **Industry Expertise** – Starboard has a strong track record in the Public Utility industry with many outstanding customer references. Our consultants understand your business and are therefore in a strong position to translate any gaps between the technical and business requirements throughout your Maximo upgrade and implementation process.
- **Recognized Excellence for Maximo Implementation** – Starboard is a premier GOLD certified implementation partner with IBM and a product reseller of the IBM Maximo products. Starboard staff comes highly recommended by IBM to perform implementation, upgrade and on-going production support services.
- **GIS Integration Expertise** –Starboard has experience designing, documenting, developing, implementing and supporting integrations between Maximo and various systems, with specific expertise in the integration of Maximo and ESRI ArcGIS.

I will be Starboard's main contractual officer. The Starboard team is an accomplished Maximo consulting practice, ready to support your project both now and into the future. We are committed to making your project a success and can perform the services according to the provisions of this RFP.

Karen A. Buck

Karen Buck
Executive Director
kbuck@starboard-consulting.com
407-622-6414

Table of Contents

1. Executive Summary

Starboard Consulting is pleased to submit this response to the City of Fort Lauderdale's Request for an Enterprise Asset Management System for the City's Public Works Department. We understand that the City is seeking an integrated "off-the-shelf" packaged solution that will meet its core requirements out-of-the-box with minimal modifications. The EAM solution must be scalable and must be tightly integrated with ESRI ArcGIS.

Starboard recommends that the City of Fort Lauderdale consider IBM Maximo® as their new EAM system. IBM Maximo is used by more than 300 utilities and public works around the world to manage a wide range of critical assets and supporting business processes including asset management, work management, maintenance management and supply chain management.

Maximo is a robust scalable product.

Maximo is a fully Web-architected solution that exceeds the City of Fort Lauderdale's functional and technical requirements.

Maximo's business process configuration capability provides unparalleled flexibility.

Maximo's interoperability easily supports integrations with the City's other mission critical systems.

Maximo's out-of-the-box functionality keeps the implementation as simple as possible.

Maximo provides the ideal framework to manage assets and process work orders for the City's various maintenance activities. Specifically, our StarMax Solution ("StarMax") provides massive and immediate benefits for the City of Fort Lauderdale. With a solid asset management foundation, you can build agility into your operations, through mobility and automation, to enable enterprise-wide best practices in asset management. And, ultimately, you can optimize capital expenditures, and achieve aggressive cost reductions.

Starboard's StarMax Solution provides an environment that we have pre-seeded with starter data, ISO-based work and asset standards, common utility-based functions, common integrations, and a mobile solution. This StarMax environment is Starboard's repository of the best Maximo offers the Utility industry in a scalable platform for both now and in the future.

About Starboard Consulting

Starboard is a Florida-based technology consultancy and system integrator, focusing solely on IBM Maximo®. As specialists in

Maximo implementations and upgrades, we are focused on delivering to the highest standards and expectations of our clients.

Starboard has provided Maximo consulting services since 2007, however, many of our employees have been working with clients for Maximo implementations, upgrades, and support for over 20 years. We are recognized as a leader in Asset Management, with applied excellence in technology that solves clients' real-world problems. Our team of professionals brings industry knowledge, technical expertise, and a proven approach to our projects.

Starboard consultants create partnerships with our clients that extend beyond technology. We listen to and work with clients every step of the way, managing change for the people and processes impacted by the implementation. Starboard professionals have been assisting clients with Maximo projects for more than 20 years. Our people are our strength.

IBM Premier Business Partner

Starboard is an IBM Premier Business Partner, the highest level of partner status available, as well as a GOLD accredited partner. This recognition indicates that we meet the highest standards in technical certification for delivering IBM Maximo solutions.

Starboard consultants are certified IBM Maximo Deployment professionals, collectively offering several decades of asset management experience to our clients.

IBM Maximo is the only EAM software product that Starboard implements; it is our sole focus because we believe it is the most capable, comprehensive, and stable solution for asset and maintenance management available today. Our staff all have extensive experience with the product, hold multiple IBM technical certifications, and are committed to providing our clients with personalized service and support that is second to none. Maximo is our business!

Starboard's Key Differentiators

Starboard puts forth this proposal with confidence, knowing that the following key differentiators set us apart from others:

- Qualifications
  - Gold Certified for Maximo – Highest IBM accreditation ranking for Maximo.
  - Experience with all versions of Maximo, including implementations, upgrades, Maximo assessments and Maximo business process improvements.
  - Experience with and knowledge of Enterprise Asset Management and the technical implementation of Maximo.
  - Specialize in GIS Integrations
  - Certified Mobile Specialists
  - IBM credentialed and approved Level 1 and Level 2 support provider
- Proven Methodology
- Experienced Team

- Extensive Utility and Water/Wastewater Industry Knowledge
- Robust Training Curriculum development and execution

Utility Industry Experience

Starboard Consulting has extensive asset management experience and can provide organizational best practices as part of implementing Maximo for Utilities and Public Sector Clients. Starboard has performed Maximo implementations, upgrades and support services for more than 10 years for Utility clients, many of whom are municipal utilities like the City of Fort Lauderdale.

Expert Staff

Our team includes highly experienced and IBM-certified project managers, business analysts, application developers, and implementation and training specialists.

Recognized Excellence for Maximo Implementation

Starboard is a premier (GOLD) certified IBM Partner and reseller of the Maximo suite of products, embedded in the IBM Watson Internet of Things. Starboard staff comes highly recommended by IBM to perform implementation, upgrade and on-going production support services.

Experience with Asset and Work Management Process Standardization

Starboard has extensive experience working with clients to assess and define business processes. Our mission is to ensure that the technological solutions implemented best meet the business practices for our clients. Starboard considers the development of a business process and workflow to be a critical path dependency within the initial phases of the project. We understand that, to successfully implement a system to meet a client's specific business needs, it is important to understand the business context in which the system will be used.

Systems Integration

All of Starboard's Maximo implementation and upgrade projects have involved multiple integrations. The technical architecture of IBM's Maximo is uniquely positioned to support the City's integration needs (Lawson ERP and ESRI ArcGIS) as well as future applications. Maximo will grow and change with the City over time, as business needs dictate, serving the users well today while providing the foundation to expand to new areas in the future.

Mobile

Maximo offers mobile solutions that work in connected and disconnected mode such that users may continue to work even when in areas where coverage is not available. The store and

forward technique allows users to work without interruption yet still send all completed transactions back to the Maximo server when they are back within coverage range.

Robust Training Curriculum Development and Execution

Training is an integral part of a successful Maximo implementation. Starboard has developed a multimedia training methodology based on the tactical and strategic needs of implementing Maximo that is easily adaptable to meet or exceed specific client needs.

Project Team

The Starboard project team provides a best-of-breed approach to Enterprise Asset Management and best practices Maximo implementation. Starboard has a proud history of working with clients to promote the delivery of best practice asset management and technology solutions. Starboard can assure the City of a seasoned, professional, multi-level approach to the change management, risk mitigation, and cultural adaptations for this project. Starboard will provide the City with a proven project methodology that will foster project success, maintainability, and sustainability.

Starboard's project organizational chart includes both Asset Management and Business Process Maximo teams as well as the technical implementation specialists to be involved in the City's Enterprise Asset Management implementation. Starboard is highly experienced at understanding Best Practice Maximo Asset Management workflows and implementing Maximo throughout organizations like the City of Fort Lauderdale.

The proposed Starboard team has both the knowledge and experience to achieve the City's desired goals and objectives for this project. Starboard has proposed key individuals that will be made available and are committed to working this project from beginning to end, to the total satisfaction of the City.

Starboard's Modeler / Solutions Director, John Brietz:

A Starboard Solutions Director is responsible for understanding the Stakeholder vision and ensuring that the defined solution meets their needs. Given the importance of the role to the City's project, Starboard proposes one of its senior Solutions Directors, John Brietz.

John brings over 16 years of experience with Maximo, encompassing a broad range of activities. His Maximo skills include application design, system configuration, business process design, preventive maintenance forecasting, work management, purchasing and inventory management, asset management, operations and facilities management, project management, test planning and script development, integration testing, and end-user training and support. John has a strong understanding of Maximo functional and development processes and is able to rapidly discern support requirements and incorporate into solutions.

Starboard believes John is an ideal candidate for the City's EAM project for the following reasons:

Experience with the Utilities and Public Sector Industries and Similarly-Sized Projects

John has completed over 40 projects for 25 clients in the local government and utility industries, including direct responsibility for the Maximo project at American Electric Power (AEP), Orange County Utilities (Florida), and the City of Austin, Texas.

Depth of Maximo Knowledge

John has worked exclusively with the various versions of the Maximo product line from version 3.x through the current version, Maximo 7.6, and has implemented all of the complementary enabling technologies with interfaces to the pertinent enterprise systems including GIS, Mobile, SCADA, Financials, HR, Fleet, CIS, CCTV, Inspection, Outage Management, and One Call (various).

Project Management and Applicable Certifications

John has the following certifications:

- Maximo (multiple versions) – IBM Certified Deployment Professional
- Tivoli Asset Management (multiple versions)
- IBM Certified Solutions Advisor
- IBM Certified Support Associate
- IBM Service Management Asset and Financial Management
- IBM Certified Deployment Professional – Maximo Asset Management V7.6 Functional Analyst

John is a local Florida resource who will spend most of his time early in the project, during stakeholder analysis and integration design workshops. Once the project vision is set, he will continue to support the team as a Subject Matter Expert during development activities and then will participate in training and knowledge-sharing activities before deployment.

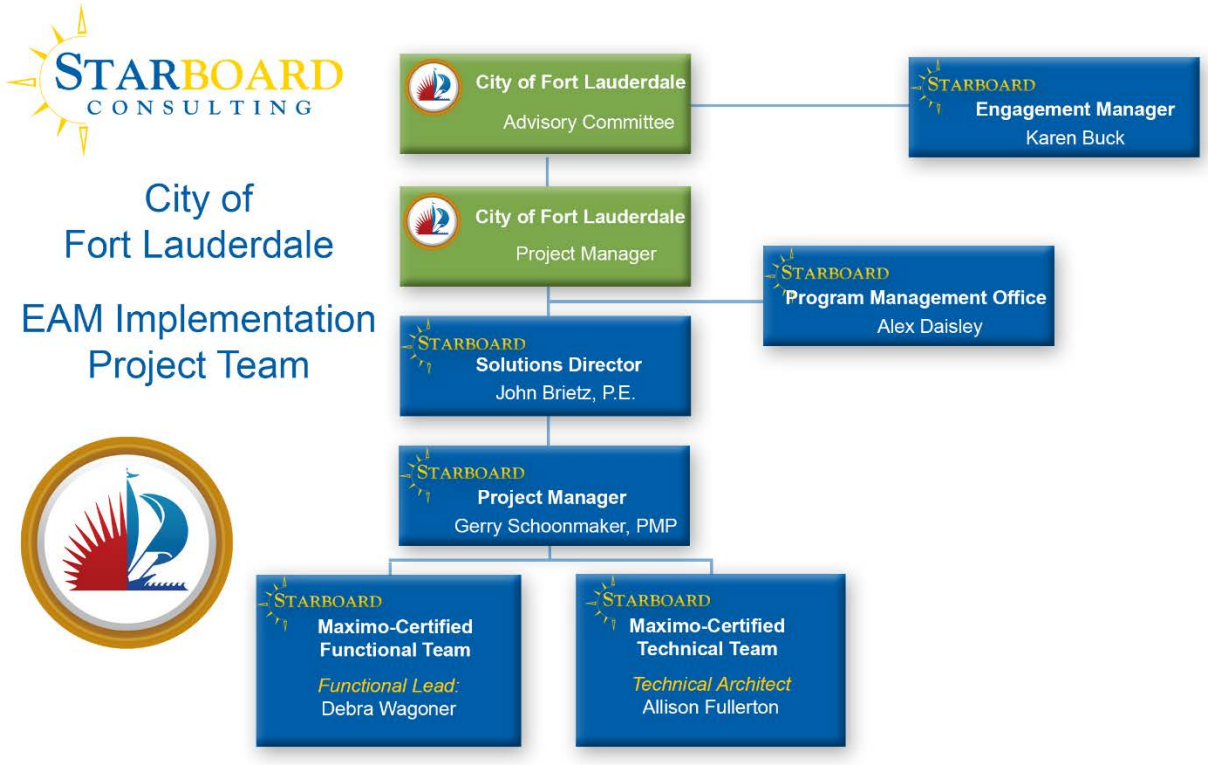
Starboard's Project Manager, Gerry Schoonmaker:

Gerry Schoonmaker is a PMP-certified IT professional. His areas of expertise include: IBM Maximo Implementations; Project Management; Operations Management; Capital and Operations Improvement Budgeting; Bid Requests, Contract Development and Negotiating; Compliance Liaison; Long-Term Planning; Work Management Programs; Maintenance Programs; Emergency Operations Management; and Utility Acquisitions.

Gerry has 30 years' experience in the Water/Wastewater Industry, and is a regional director for Florida's Water & Pollution Control Operators Association (FWPCOA); he currently holds a Florida "A" Wastewater license and Florida "C" Water license.

He has managed resources, systems implementation and integration programs, and upgrade initiatives. Gerry has extensive experience in leading teams and providing project management skills to ensure that requirements, designs, coding, testing, and implementation plans meet the needs of the business and IT. His core strengths include his ability to manage multiple projects from initiation through implementation using organizational, business analysis, and project management disciplines. Gerry has the experience and knowledge to successfully lead the City's Maximo implementation.

Project Team Organization Chart



The following key resources will have significant roles in the City's Maximo EAM implementation. Please review the included resumes to appreciate the depth of functional and technical expertise that Starboard is proposing.

Resume Summaries

Name	Role	Credentials
Karen Buck	Engagement Manager	Karen has over 30 years of information technology (IT) senior management experience and more than 15 years building and managing IBM Maximo Consulting Practices to deliver high

		quality implementation consulting services to the Public Section industry – Electric, Water, Wastewater, and Gas. She is responsible for business development and client relationship management.
John Brietz	Solutions Director	John brings over 15 years of experience with Maximo encompassing a broad range of activities. His Maximo skills include application design, system configuration, business process design, preventive maintenance forecasting, work management, purchasing and inventory management, asset management, operations and facilities management, project management, test planning and script development, integration testing, and end-user training and support. John has a strong understanding of Maximo functional and development processes and can rapidly discern support requirements and incorporate into solutions.
Alex Daisley	Program Manager	Alex has over 25 years of information technology consulting experience leading the development and delivery of complex business strategies, and systems development and implementation programs for Global 500 corporations. He is an accomplished practitioner on multiple Program, Project, and Business Process Engineering Methodologies.
Gerry Schoonmaker	Project Manager	Gerry has managed resources, systems implementation and integration programs, and upgrade initiatives. Gerry has extensive experience in leading teams and providing project management skills to ensure that requirements, designs, coding, testing, and implementation plans meet the needs of the business and IT. His core strengths include his ability to manage multiple projects from initiation through implementation using organizational, business analysis, and project management disciplines.
Debra Wagoner	Functional Lead	Debra's Maximo skills include application design, system configuration, business process design, preventive maintenance forecasting, work management, purchasing and inventory management, asset management, operations and facilities management, project management, test planning and script development, integration testing, and training and support.

Allison Fullerton	Technical Architect	Allison has industry experience and is focused on implementing Maximo for utility clients - Electric, Water and Wastewater. As a Senior Developer, she takes the lead on significant components of a project, contributing to or leading the development effort on integrations, configurations, workflow development, report writing, and technical training.

Resumes

Complete resumes are included at the end of this section for the proposed team members.

Conclusion

Starboard Consulting possesses the organizational, functional and technical capabilities to provide an Enterprise Asset Management (EAM) solution that meets the City's needs and is tightly integrated with ESRI ArcGIS.

What Starboard Consulting offers the City of Fort Lauderdale is unique in terms of product, team, and implementation approach. IBM's Maximo is a best of breed solution second to none in the marketplace and our StarMax solution further enhances this standing. Our project team, through our implementation experiences and industry and product expertise, is the best at what we do.

JOHN BRIETZ – SOLUTIONS DIRECTOR

Years of Maximo Experience: 18

Role: John has participated in and led the implementation of over 35 Maximo projects spanning versions 3.0 to v7.6. His project work has included initial installs for new clients, support and enhancement work, and significant upgrades across multiple releases. John has provided vision and direction to clients and internal staff on application and integration design, solving complex business requirements with Maximo.

Industries:

- Municipalities (City/County)
- Water (Plant/Field)
- Wastewater (Plant/Field)
- Electric – (Generation/T & D)
- Facilities Management

Education:

Master in Business Administration – Rollins College, Roy E. Crummer Graduate School of Business

Bachelor of Electrical Engineering – Florida State University

John's LinkedIn Page

CERTIFICATIONS

- IBM Certified Deployment Professional - Maximo Asset Management V7.6
- IBM Certified Advanced Deployment Professional - Maximo Asset Management V5, V6, V7.1, V7.5, V7.6
- IBM Certified Advanced Deployment Professional – IBM Service and Asset Management
- IBM Certified Solution Advisor
- IBM Certified Support Associate – Tivoli Support Provider Tools and Processes

TECHNICAL SKILLS

✓ Installations/Upgrades	✓ Conditional Expressions	✓ WebSphere
✓ Integration Framework	✓ Workflow Designer	✓ Enterprise Bus
✓ Application Designer	✓ Automation Scripts	✓ AD/LDAP
✓ Database Configuration	✓ SQL Procedures/Objects	✓ User/Security Group
✓ Migration Manager	✓ Cron/Scheduled Jobs	✓ Start Centers

MAXIMO EXPERTISE

✓ Maximo Asset Mgmt	✓ Maximo EveryPlace	✓ Maximo Spatial
✓ Transportation	✓ Maximo AnyWhere	✓ Scheduler
✓ Maximo for Utilities	✓ Other Mobile	✓ Calibration
✓ HSE	✓ Linear Asset Mgr	✓ IBM Control Desk

INTEGRATION EXPERTISE

✓ CBM/SCADA	Wonderware, Inspections, Test/Scoring Systems
✓ CCTV	Granite XP, Pipeline
✓ CIS	SAP, Banner, Cayenta, PeopleSoft, Hansen, CUBs, CC&B
✓ DMS	Documentum, SharePoint
✓ FMS	Oracle Financials, SAP, PeopleSoft, Dynamics, Lawson
✓ Fuel	EJWard, MegaTrak, GasBoy, Others
✓ GIS	ESRI, Google, Bing
✓ HR	Kronos, Workforce, PeopleSoft, Oracle, SAP
✓ OMS	Schneider, Integraph, Custom
✓ Planning	Primavera, Microsoft Project

SAMPLING OF RELEVANT CLIENT EXPERIENCE

Orange County, FL Utilities

Project Manager and Architect for a Maximo 5.2 to 7.5 upgrade, covering Water, Wastewater, Field Services, Solid Waste, Fiscal, IT and Engineering. Integrations with Procurement, GIS and CIS; Mobile Work Management, and Fleet Maintenance.

Hoosier Energy

Solution Director for Maximo 7.5 to 7.6 upgrade. Included Integration to Dynamics Financials and SAP Mobile Work Manager. Responsibilities included ensuring all existing data, configurations, integration and reports were upgraded successfully.

GERRY SCHOONMAKER – PROJECT MANAGER

Years of Experience: 20

Professional Affiliations:

- American Water Works Association (AWWA)
- American Public Works Association (APWA)
- Florida Water & Pollution Operators Association (FW&PCOA)
- Water Environmental Federation (WEF)
- Suncoast Project Management Chapter

Education:

Associate Degree in Computer Networking

Industries:

- Municipalities (City/County)
- Electric – (Generation/T & D)
- Water, Wastewater, and Storm

Gerry's LinkedIn Page

PROFESSIONAL SUMMARY

Gerry has over 20 years' experience in the field of water resources and utilities, managing every aspect of municipal and private water and wastewater operations and maintenance. His areas of expertise include: IBM Maximo Implementations for Water, Wastewater, and Storm Utilities; Project Management; Operations Management; Capital and Operations Improvement Budgeting; Bid Requests; Contract Development and Negotiating; Compliance Liaison; Long-Term Planning; Work Management Programs; Maintenance Programs; Emergency Operations Management; and Utility Acquisitions. Gerry holds a PMP certification along with his Florida "A" Wastewater and "C" Water Licenses.

AREAS OF EXPERTISE

- ✓ Change Management
- ✓ Stakeholder Management
- ✓ Risk Management
- ✓ Communication Management
- ✓ GIS/Spatial Implementation
- ✓ Asset Management
- ✓ System Integrations
- ✓ Needs Assessment

SUBJECT MATTER EXPERIENCE

For many years, Gerry worked as a user of Maximo with Sarasota County where he worked in departments managing Treatment, Collection, and Distribution assets. Gerry is a Project Manager for Starboard and thus his experience below reflects that but he does serve as an industry expert on the projects where it is a Water or Wastewater client.

Kansas City Board of Public Utilities – $1.4 million, 300 users, 14 months.

Project Manager for a Maximo 7.5 implementation for Electric T&D, Water Production, and Water Distribution systems. Responsibilities include project oversight to manage schedule, budget and contractual compliance; ensure objectives and goals are achieved; and management of solution design and QA.

Penn State University – $1.0 million, 300 users, 7 months.

Project Manager for an upgrade from Maximo 7.5 to Maximo 7.6. Responsibilities include project oversight to manage schedule, budget and contractual compliance; ensure objectives and goals are achieved; and management of solution design and QA.

Columbus Water Works (CWW) - $500,000, 100 users, 18 months.

Project Manager for a Maximo 7.5 Spatial Implementation. Including additional configurations to the Maximo Purchase Order module, Report Development, and Security modules. Responsibilities include project oversight to manage schedule, budget and contractual compliance; ensure objectives and goals are achieved; and management of solution design and QA.

Pasadena Refining System, Inc. (PRSI) - $250,000, 100 users, 18 months.

Project Manager for an upgrade from Maximo 6 to Maximo 7.5. Including additional configurations to the Maximo Purchase Order module, Report Development, and Security modules. Responsibilities include project oversight to manage schedule, budget and contractual compliance; ensure objectives and goals are achieved; and management of solution design and QA.

ALEXANDER DAISLEY – PMO DIRECTOR

Years of Experience: 25

Professional Affiliations:

- PRINCE2 Professional
- Method/1 Practitioner
- PERFORM Professional
- Organizational Change Management Practitioner

Education:

Bachelor of Science – Latton Bush, UK

Industries:

- Municipalities (City/County)
- Water/Wastewater
- Electric – (Generation/T&D)
- Energy
- Manufacturing
- IT Consulting

Alex's LinkedIn Page

PROFESSIONAL SUMMARY

Alex has over 25 years of experience of information technology consulting experience leading the development and delivery of complex business strategies, and systems development and implementation programs across multiple domestic and international geographies.

Alex has extensive Organizational Change Management experience, focusing on successful enterprise-wide implementations in multiple business sectors including: Utilities; Local, State and Federal Governments; Energy; Automotive; Banking; Financial Services; Health Care; Insurance; Manufacturing; Telecommunications.

AREAS OF EXPERTISE

- ✓ Organizational Change Management
- ✓ Stakeholder Management
- ✓ Risk Management
- ✓ Communication Management
- ✓ Needs Assessments
- ✓ Asset Management
- ✓ System Integrations
- ✓ GIS/Spatial Implementation

PMO/CHANGE MANAGEMENT EXPERIENCE

Multiple Utility Clients

Program Manager for a variety of major Municipalities, and Public, Utility organizations. Led strategic projects, including the integration of third-party, mission-critical systems, e.g., Customer Care and Billing, Meters, etc.

Led multiple Organizational Change Management projects for all aspects of Enterprise-Wide Maximo implementations, including Sponsor & Employee Buy-In, Governance, Organizational Changes, Personnel Growth Planning, etc.

Engagement Manager for multiple new Maximo Implementations, and all varieties of Maximo Upgrade projects, bringing enterprises up to the then-current version of Maximo and providing the foundation for their Strategic Asset Management initiatives.

Multiple Non-Utility Clients

Provided business, technical, and program leadership for one of the world's largest car Manufacturers, while implementing their European Supply Base Management System, followed by the Global Supply Base Management System.

Provided business and technical analysis into the Management Information Review for a global Energy company, as part of the upgrading of their Group Financial Information Systems, including all related Organizational Change Management activities.

Provided technology consulting on the Stand Alone Sales Support System, one of the most critical and profitable applications within the portfolio for a global Banking & Investment company.

DEBRA WAGONER – FUNCTIONAL LEAD

Years of Maximo Experience: 10

Role: Debra's Maximo skills include application design, system configuration, business process design, preventive maintenance forecasting, work management, purchasing and inventory management, asset management, operations and facilities management, project management, test planning and script development, integration testing, and end-user training and support.

Industries:

- Government (City/County/Federal)
- Water (Plant/Field)
- Wastewater (Plant/Field)
- Electric – (T & D)
- Facilities Management
- IT Service Management
- Aerospace

Education:

Master of Science & Bachelor of Science in Management Information Systems - University of Central Florida

Associate of Arts in Software Development -
Eastern Florida State College

Debra's LinkedIn Page

CERTIFICATIONS

- IBM Certified Deployment Professional – Maximo Asset Management Versions 7.5, and 7.6
- IBM Certified Deployment Professional – Tivoli Process Automation Engine V7.5
- IBM Certified Deployment Professional – SmartCloud Control Desk V7.5.1 IT Asset Management
- ITIL Foundations V2 and V3

MAXIMO EXPERTISE

- ✓ Maximo Asset Mgmt
- ✓ Maximo for Utilities
- ✓ Maximo EveryPlace
- ✓ IBM Control Desk

INTEGRATION EXPERTISE

✓	CIS	Cayenta
✓	Design	Designer
✓	GIS	ESRI

SAMPLING OF RELEVANT CLIENT EXPERIENCE

City of Roseville – Performed regression testing and facilitated user acceptance testing for the upgrade of Maximo 7.1 with SCCD add on to Maximo 7.6 with SCCD disabled. Led the integration of the Maximo Meter Assets (T&D) with the Cayenta customer information system in the Maximo 7.6 environment. Prepared implementation documentation, facilitated review meetings, and tested functionality to ensure a smooth and successful integration.

CoServ Electric – Led the requirements definition for a new standup of Maximo 7.6. P Prepared implementation documentation, facilitated review meetings, and tested functionality to ensure a smooth and successful integration. Delivered end-user training to multiple Maximo end-user communities.

US Air Force – Developed requirements and supported the upgrade from version 6.2 to 7.5. Developed and deployed system modifications including design and implementation of workflows, escalations, and XML coding. Performed SQL database administration including advanced scripting, data analysis, stored procedures, triggers, index analysis and data export for external systems. Coordinated software quality testing including test script generation, troubleshooting, and monitoring application availability and performance. Maintained system configuration documentation.

ALLISON FULLERTON – TECHNICAL ARCHITECT

Years of Maximo Experience: 17

Role: Allison has industry experience and is focused on implementing Maximo for utility clients - Electric, Water and Wastewater. As a Senior Developer, she takes the lead on significant components of a project, contributing to or leading the development effort on integrations, configurations, workflow development, report writing, and technical training.

Industries:

- Municipalities (City/County)
- Water (Plant/Field)
- Wastewater (Plant/Field)
- Electric – (Generation/T & D)
- Facilities Management

Education:

Bachelor of Science in Psychology – Georgia State University

Allison's LinkedIn Page

CERTIFICATIONS

- IBM Certified Advanced Deployment Professional – Maximo Asset Management 7.6
- IBM Certified Support Associate – Cloud and Smarter Infrastructure Support Provider Tools and Processes
- IBM Certified Deployment Professional - Maximo Asset Management V7.5
- IBM Certified Deployment Professional - Maximo Asset Management V7.1

TECHNICAL SKILLS

✓ Installations/Upgrades	✓ Conditional Expressions	✓ WebSphere
✓ Integration Framework	✓ Workflow Designer	✓ Enterprise Bus
✓ Application Designer	✓ Automation Scripts	✓ BIRT Report Writing
✓ Database Configuration	✓ SQL Procedures/Objects	✓ User/Security Group
✓ Migration Manager	✓ Cron/Scheduled Jobs	✓ Start Centers

MAXIMO EXPERTISE

✓ Maximo Asset Mgmt	✓ HSE	✓ Maximo Spatial
✓ Maximo Aviation	✓ Maximo EveryPlace	✓ Scheduler
✓ Maximo for Utilities	✓ Maximo AnyWhere	✓ Calibration
✓ Maximo Nuclear	✓ Other Mobile	✓ IBM Control Desk
✓ Maximo Oil & Gas	✓ Linear Asset Mgr	✓ Transportation

INTEGRATION EXPERTISE

✓ CIS	SAP, Cayenta, PeopleSoft, CUBs
✓ Design	Schneider Designer, AutoDesk Utility Design, Bentley Designer
✓ DMS	Documentum, SharePoint
✓ FMS	Oracle Financials, SAP, PeopleSoft, Dynamics, Lawson
✓ Fuel	Ward, MegaTrack, GasBoy, Others
✓ HR	Kronos, Workforce, PeoplSoft, Oracle, SAP
✓ OMS	Schneider, Integraph, Custom
✓ Planning	Primavera, Oracle Real-Time, Microsoft Project

SAMPLING OF RELEVANT CLIENT EXPERIENCE

Anchorage Water/Wastewater Utility – Allison led the technical effort as the Technical Architect for a Maximo implementation involving a FIS interface to SAP, GIS interface to ESRI, CIS interface to Banner, Fuel Interface to GasBoy, and data loading from spreadsheets captured by the users based on facility audits.

Foundational Solution – Allison was the Technical Architect on the Foundational Solution developed by Starboard for its Utility users that includes a mobile solution, interface to FIS, CIS, and GIS, Utility Specific solutions, and objects for data loading based on spreadsheets of data captured by the customer.

Various – For each Maximo implementation, Starboard includes Maximo Administration training and Allison is one of our primary trainers.

Form 1 – General Supplier Information

Proposer and Software Information	NOTE: **IBM** is the developer of Maximo Asset Management Software; The Proposer, **Starboard Consulting,** is a licensed reseller and implementer of Maximo Asset Management
1. Contact Information	
a. Company Name	IBM
b. Name and Title of Contact Person	Starboard Consulting, LLC will be the contact for software information: Nestor Vinas, Sales Director Starboard Consulting, LLC
c. Company Address	IBM 1 New Orchard Rd, Armonk, NY 10504 Armonk, NY
d. Telephone	IBM telephone: (914) 499-1900
e. Email Address	(See 1b, above) nvinas@starboard-consulting.com
f. Company Website	IBM: http://www.ibm.com
2. Regional Offices and Staff	
a. Describe whether your organization is local, regional, national or international.	IBM is an International organization.
b. Regional office servicing this engagement	IBM's Armonk, NY office
c. Describe the range of services provided by the office servicing the engagement and # of employees.	Starboard Consulting will be providing implementation services for this engagement. See Partner Section, below.
3. Company Information	
a. Briefly describe your company and the characteristics that set your company apart in terms of service, methodology, approach, and software, etc.	International Business Machines Corporation (commonly referred to as IBM) is an American multinational technology company headquartered in Armonk, New York, United States, with operations in over 170 countries. IBM manufactures and markets computer hardware, middleware and software, and

	offers hosting and consulting services in areas ranging from mainframe computers to nanotechnology. IBM is also a major research organization, holding the record for most patents generated by a business (as of 2017) for 24 consecutive years.
b. Briefly describe how you will meet our requirements and maximize our return on investment.	For more than a century **IBM** has been dedicated to every client's success and to creating innovations that matter for the world. IBM continuously invests in software research and development. IBM's customers have the advantage of being on the forefront of technology with the safety and support of IBM's backing.
c. Year Founded	1911
d. Private vs. Public (Listing Exchange and Listing Code)	IBM is a Publically traded company. Listing code: IBM
e. Fiscal Year End	IBM's Fiscal Year End is December 31
f. Revenue: Current Year	IBM does not make revenue details publicly available. Information that does exist with respect to such issues can be found in the annual report filed with the Securities and Exchange Commission or on the IBM website at: http://www.ibm.com/investor/company/index.phtml
g. Revenue: Prior Year	IBM does not make revenue details publicly available. Information that does exist with respect to such issues can be found in the annual report filed with the Securities and Exchange Commission or on the IBM website at: http://www.ibm.com/investor/company/index.phtml
h. Net Income/Loss: Current Year	IBM does not make revenue details publicly available.

	Information that does exist with respect to such issues can be found in the annual report filed with the Securities and Exchange Commission or on the IBM website at: http://www.ibm.com/investor/company/index.phtml
i. Net Income/Loss: Prior Year	IBM does not make revenue details publicly available. Information that does exist with respect to such issues can be found in the annual report filed with the Securities and Exchange Commission or on the IBM website at: http://www.ibm.com/investor/company/index.phtml
j. % of gross revenue generated by proposed software & related maintenance and services.	IBM does not separate out software and services gross revenue. Published details around IBM's revenue can be found in the annual report filed with the Securities and Exchange Commission or on the IBM website at: http://www.ibm.com/investor/company/index.phtml
k. Parent Company (If separate)	N/A
l. Describe parent company's relationship with the proposing party.	N/A
m. Mergers and Acquisitions (Changing business, name changes, acquisitions/mergers, etc.)	IBM does not make the details of pending mergers and acquisitions or divestitures publicly available. However, IBM represents that there is no past or pending merger, acquisition, or divestiture activity that would prevent IBM from discharging its obligations under a contract finally awarded to IBM. Information that does exist with respect to such issues can be found in the annual report filed with the Securities and Exchange Commission or on the IBM website at: http://www.ibm.com/investor/company/index.phtml

n. Describe if your organization is international, national, regional or local. Please explain.	IBM is an international company.
o. Describe how the company has grown. Organically or thru acquisition, thru mergers, etc.?	IBM has grown both organically and through acquisitions. IBM acquired Maximo Asset Management from MRO Software in 2006.
p. Are there any planned acquisitions or mergers in the future?	See 3.m. above.
q. Disclose any recent litigation (and outcomes) and litigation currently underway.	IBM does not make the details of litigation publicly available. However, IBM represents that there is no past or pending litigation activity that would prevent IBM from discharging its obligations under a contract finally awarded to IBM.
4. Staff (List Staff and Sub-Consultants Separately) Employees	
a. Total Worldwide	Approximately 395,000
b. Total in U.S.	IBM does not disclose employee specifics. IBM's employee population is highly flexible and mobile, which allows IBM to adapt quickly to meet Client commitments.
c. Staff dedicated to the proposed software	IBM does not disclose employee specifics. IBM's employee population is highly flexible and mobile, which allows IBM to adapt quickly to meet Client commitments.
d. U.S. staff dedicated to the proposed software	IBM does not disclose employee specifics. IBM's employee population is highly flexible and mobile, which allows IBM to adapt quickly to meet Client commitments.
e. Full-time employees in: - Implementation and training - Customer service - Technical/Development - Administrative - Other (note relevant staff):	IBM does not disclose employee specifics. IBM's employee population is highly flexible and mobile, which allows IBM to adapt quickly to meet Client commitments.
5. Number of Customers Using the Proposed Software	

a. Total Worldwide	Approximately 7,000
b. Total in U.S.	Approximately 1,000
c. Florida Cities and clients other than cities using the proposed software in Florida	Approximately 25
d. Other cities using the proposed version	Approximately 200
6. List your City customers with similar requirements installed with your proposed solution	Below is a sample of City and County customers: City of Lakeland City of Vero Beach City & County of San Francisco City of Albuquerque City of Arlington City of Atlanta City of Austin City of Bellevue City of Chesapeake City of Corpus Christi City of Grand Rapids City of Honolulu Water City of Portland City of San Bernardino City of San Marcos City of Sunnyvale Wake County Government Orange County Utilities Orange County Palm Beach County Water Broward County utilities Sarasota County Tampa Bay Water Disney RCID (Reedy Creek Improvement District) Orlando Airport Jacksonville Port Authority Lee County Port Authority Broward County Water Broward County Avaition City Boca Raton
7. Supplier's Implementation Model – Direct, VAR, Implementation Partner, etc.	IBM utilizes partners to both sell and implement IBM Maximo. Starboard is a Gold-accredited IBM Premier Business Partner. (See Partner Section, below)
8. Version Schedule	
a. Current version and general availability release date	Maximo 7.6.0.7

b. Proposed version & general availability release date	Maximo 7.6.0.8 December 2017
c. Estimated release date for next version	December 2018
d. Typical release schedule & time to install	IBM provides point releases approximately every 3-4 months. Time to install will depend on the new features, as well as the requirements of the City.
e. Number of prior versions supported	IBM will support Maximo 7.5 until April 2018.
9. User protection plans Briefly describe what user protection plans you have. For example: a. Source code held in Escrow b. No charge to migrate to similar new software (e.g. new technology c. Other options	Due to the high value and strategic importance that IBM places on its source code, and the harm that could result from disclosure, IBM has adopted a policy of not putting into escrow, source code for its licensed programs. Most IBM customers understand IBM's position and take comfort in IBM's stability and reputation. Customers that are current in their maintenance subscription will receive Maximo fix and feature packs and no additional cost.
10. We require having development, back-up, training, testing and archival copies of the software in addition to the production copy. Is this provided as standard with your Software? If there is a cost, please list in your proposal	Starboard consulting has allowed for development, testing training, and production environments as part of our proposal. Also, you can have unlimited instances of Maximo setup with no additional cost.
11. Briefly describe your customer service and support. a. What options and the cost b. What is covered and what isn't c. Customer support hours d. When do the software maintenance agreement does goes into effect?	See Section 2.19, Tab 3 of Starboard Consulting's proposal.
12. Briefly describe your training: **a.** Approach and philosophy **b.** Options (Learning center, interactive Web courses, CD/DVD, onsite, train-the-trainer, etc.) **c.** Prices/rates	See Section 2.13-2.17, Tab 3 of Starboard Consulting's proposal.
13. Company Qualifications	

a. Three or more years of related EAM system experience. Briefly describe.	In 1985, the first release of Maximo was published by MRO Software, Inc. based in Bedford, Massachusetts – formerly known as PSDI (founded in 1968). In Dec 2000, PSDI announced a formal change of company name to MRO Software. MRO Software was acquired by IBM in August 2006. Maximo has been rated as the top leader in utilities enterprise asset management by Gartner for over 15 years.
b. Experience working with cities of our size. Briefly describe.	Maximo has been used in Cities and Counties throughout the US and throughout the world. (See 6, above)
c. Briefly describe your experience integrating with ESRI GIS.	IBM provides a specific adapter for Maximo and ESRI called IBM Maximo® Spatial Asset Management. This adapter allows users to seamlessly view complex GIS information inside Maximo. It provides a geospatial context of work, assets and relevant land-based features. This adapter uses the latest ESRI ArcGIS technology.
Contract and Agreements	
14. Contract Termination for Default Please list all incidents in the past 5 years in which you have had a contract terminated for default. Termination for default is defined as notice to stop performance due to your non-performance or poor performance; and the issue was either (a) not litigated or (b) litigated, and such litigation determined you to be in default. Please provide: a. Full details of all terminations for default b. The other party's name, address and telephone c. Your position on the matter	It is not IBM policy to make public the details regarding contracts that may have been terminated for default. However, IBM is not aware of anything that would prohibit IBM from complying with the terms of a contract awarded to IBM because of this RFP.
15. Contract termination before contract completion for convenience, non-performance, non-allocation of funds, etc. Please list all incidents in the past 5 years in which you have had a contract terminated before completion (e.g. for convenience non-performance, non-allocation of funds or any other reason) Please provide: a. Full details of all such terminations b. The other party's name, address and telephone c. Your position on the matter	Occasionally, customer needs and requirements change, and their relationship with IBM and the business they conduct with IBM therefore changes. IBM regrets that business practices do not permit IBM to divulge information regarding "former" customers, engagements, or the specific engagements that current customers have discontinued.

16. Capacity and Capability Give an exact schedule of the projects that are anticipating, pending, in progress and nearing completion Please list all projects in that are in progress, pending start dates, near completion and that I anticipate with the next 5 months to three (3) years.	Starboard Consulting will be providing implementation and project services. See the answer in the Partner Section, below.

Proposed Implementation Partner/System Integrator/Project Manager/VAR Information	NOTE: IBM is the developer of Maximo Asset Management Software; Starboard Consulting is a licensed reseller and implementer of Maximo Asset Management
1. Contact Information	
a. Company Name	Starboard Consulting, LLC
b. Name and Title of Contact Person	Nestor Vinas, Sales Director
c. Company Address	2170 West SR 434, Suite 124 Longwood, FL 32779
d. Telephone	813-960-7260
e. Email Address	nvinas@starboard-consulting.com
f. Company Website	www.starboard-consulting.com
2. Regional Offices and Staff	
a. Describe whether your organization is local, regional, national or international.	Starboard is a National company.
b. Regional office performing this engagement.	Starboard's office is located in Longwood, FL
c. Describe the range of services provided by the office performing the engagement and # of employees.	Starboard Consulting provides full-service consulting, sales, implementation, training, and support of IBM Maximo Asset Management. Starboard currently has 35 full-time employees.
3. Company Information	Starboard Consulting is a Gold-accredited IBM Premier Business Partner, and an IBM Maximo software reseller. Services include: implementation, including

	planning, assessments, requirements definition, configuration, testing, departmental roll-outs, comprehensive training, and ongoing support. Industries served include utilities, municipal governments, public works, airports, and higher education.
a. Briefly describe your company and the characteristics that set your company apart.	Starboard believes every client deserves the right solution for their work and asset management needs, regardless of their budget. We offer innovative solutions, designed to fit your specific requirements, built on the IBM Maximo platform by our experienced team of consultants who understand the challenges of your industry.
b. How many years of experience do you have implementing the proposed software?	Starboard Consulting has over 10 years' experience in implementing Maximo Asset Management.
c. Briefly describe how you will meet our requirements and maximize our return on investment.	Starboard is a "Gold" Premier Accreditation by IBM, this is the Highest Available IBM partnership designation. Starboard provides both Reseller and First Level Support of IBM Maximo Asset Management. We are dedicated an IBM Maximo consulting practice with a vast Public Sector Industry Experience. In total, Starboard's Staff offers 300+ years of Maximo experience Starboard Consulting is THE "Go To" Implementer of Maximo Spatial and GIS Integrations. Over 80% of our clients are in the Water, Wastewater, Gas, Electric and Power Generation. We work with cities, counties and municipalities across the country implementing Maximo.
d. Year Founded	Starboard was founded in 2007

e. Private vs. Public (Listing Exchange and Listing Code)	Starboard is a private company
f. Fiscal year end	Starboard's fiscal year end is December 31
g. Revenue: Current Year	Starboard Consulting does not make revenue details publicly available. If chosen we will provide our audited financials for the city to review. We have been profitable since inception and have no debt.
h. Revenue: Prior Year	Starboard Consulting does not make revenue details publicly available. See g.
i. Net Income/Loss: Current Year	Starboard Consulting does not make revenue details publicly available. See g.
j. Net Income/Loss: Prior Year	Starboard Consulting does not make revenue details publicly available. See g.
k. % of gross revenue generated by proposed software & related maintenance and services.	100% of Starboard's gross revenue is generated through software sales and related maintenance and services of the IBM Maximo suite of products
l. Parent Company (If separate)	N/A
m. Describe parent company's relationship with the proposing party.	N/A
n. Genealogy of Organization (Changing business, name changes, acquisitions/mergers, etc.)	N/A
o. Describe if your organization is international, national, regional or local. Please explain.	Starboard is a national organization, working with companies and public sector entities throughout the US.
p. Describe how the company has grown. "Organically," thru acquisition, thru mergers, etc.?	Starboard has grown organically by providing excellent implementation and support services of IBM Maximo. Starboard actively participates in the Maximo community by attending and presenting at user group meetings.
q. Are there any planned acquisitions or mergers in the future?	There are no planned acquisitions or mergers at this time.

r. Disclose any recent litigation (and outcomes) and litigation currently underway.	There is no litigation either past or present.
4. # of Employees	35
a. Total Worldwide	35
b. Total in U.S.	35
c. # dedicated to the proposed software	35
d. U.S. # dedicated to the proposed software	35
5. Number of Customers Using the Proposed Software NOTE: These are the customers that you implemented	
a. Total Worldwide	50
b. Total in U.S.	50
c. # cities using the proposed software	10
d. # cities using the proposed version	5
e. # of cities in Washington using the proposed software. We are sure you meant Florida	2
6. List your City customers with similar requirements installed with the proposed solution. Note: These are the customers that you implemented.	City of Lakeland, City Roseville, City Asheville, City Green Bay. City Honolulu, City Knoxville Utility Board, City Corpus Christi, City Henderson
7. Target User Profile for This Software Where size are the majority of your customers using the proposed software are)? E.g. Number of citizens and operating budget.	Citizens: 100,000+ Total Operating Budget >$300M
8. Software Supplier Relationship and Implementation Model Briefly describe your relationship with the software supplier, formal software training, development work, etc.	Starboard is a “Gold” Premier Accreditation by IBM, this is the Highest Available IBM partnership designation. Starboard provides both Reseller and First Level Support of IBM Maximo Asset Management. To achieve this level, all Starboard implementation team members are certified in the current supported releases of Maximo Asset Management.
9. Have you developed any add-on products to the proposed software? If so, please explain.	Starboard has developed a number of applications utilizing the Maximo platform tools, including an accelerated implementation platform for

	water/wastewater, applications for operator rounds, budgeting, mobile work and more.
10. Briefly describe your customer service and support. a. What options are available and what is the cost b. What is covered and what isn't	See Section 2.19, Tab 3 of Starboard Consulting's proposal.
11. Briefly describe your training: a. Does the Software Supplier provide training or are you responsible for training? **b.** Approach and philosophy **c.** Options (Learning center, interactive Web courses, CD/DVD, onsite, train-the-trainer, etc.) **d.** Prices/rates	See Section 2.13-2.17, Tab 3 of Starboard Consulting's proposal
12. Company Qualifications	
a. Three or more years of related EAM system experience. Briefly describe.	Starboard Consulting, established in 2007, was formed by a group of dedicated Maximo Asset Management implementation and project experts. In total, Starboard's Staff now offers 300+ years of Maximo experience. Our only focus in is implementing Enterprise Asset Management to utility and public works organizations, utilizing the best in class EAM software coupled with GIS.
b. Experience working with cities of our size. Briefly describe.	Starboard has a number of city customers the size of Ft Lauderdale. See 6, above.
c. Briefly describe your experience integrating the proposed solution with: - QAlert Cayenta (If needed)	The Maximo Integration Framework provides an open platform for all integrations. A common integration for all Maximo customers is an integration to their financial system. Starboard has experience in integrating to ERP systems, such as QAlert Cayenta.

d. Briefly describe your experience integrating the proposed software with ESRI ArcGIS.	IBM provides a specific adapter for Maximo and ESRI called IBM Maximo® Spatial Asset Management. This adapter allows users to seamlessly view complex GIS information inside Maximo. It provides a geospatial context of work, assets and relevant land-based features. This adapter uses the latest ESRI ArcGIS technology.
13. Contract Termination for Default Please list all incidents in the past 5 years in which you have had a contract terminated for default. Termination for default is defined as notice to stop performance due to your non-performance or poor performance; and the issue was either (a) not litigated or (b) litigated, and such litigation determined you to be in default. Please provide: a. Full details of all terminations for default b. The other party's name, address and telephone c. Your position on the matter	It is not Starboard's policy to make public the details regarding contracts that may have been terminated for default. However, Starboard is not aware of anything that would prohibit Starboard from complying with the terms of a contract awarded to Starboard because of this RFP.
14. Contract termination before contract completion for convenience, non-performance, non-allocation of funds, etc. Please list all incidents in the past 5 years in which you have had a contract terminated before completion (e.g. for convenience non-performance, non-allocation of funds or any other reason) Please provide: a. Full details of all such terminations b. The other party's name, address and telephone c. Your position on the matter	Occasionally, customer needs and requirements change, and their relationship with Starboard Consulting and the business they conduct with Starboard therefore changes. Starboard regrets that business practices do not permit Starboard to divulge information regarding "former" customers, engagements, or the specific engagements that current customers have discontinued.

2. Experience and Qualifications

Corporate Overview

Starboard Consulting (Starboard) is a technology consultancy and system integrator, specializing only in IBM Maximo®. As specialists in Maximo implementations and upgrades, we are focused on delivering to the highest standards and expectations of our clients.

Starboard has been providing Maximo consulting services since 2007. Our employees offer our clients over 275 years of Maximo implementation, upgrade, and support experience. We are recognized as a leader in Asset Management, with applied excellence in technology that solves clients' real-world problems. Our team of professionals brings industry knowledge, technical expertise, and a proven approach to our projects.

- **Firm Name:** Starboard Consulting, LLC
- **Business Address:** 2170 West State Road 434, Suite 124, Longwood, FL 32779
- **Primary Contact:**
  - Nestor Vinas, Director of Sales
  - 813-960-7260
  - nvinas@starboard-consulting.com
- **Fax:** 407-622-6417
- **Year business was established:** 2007
- **Number of employees:** Starboard averages 35-40 employees.
- **Website:** www.starboard-consulting.com

Starboard is a certified Women-Owned business incorporated in the state of Florida and certified as a Small Business and Women-Owned Small Business in the Federal SAM system.

IBM Premier Business Partner

Starboard is an IBM Premier Business Partner, the highest level of partner status available, as well as a GOLD accredited partner. This recognition indicates that we meet the highest standards in technical certification for delivering IBM Maximo solutions. Starboard consultants are certified IBM Maximo Deployment professionals, collectively offering several decades of asset management experience to our clients.

Starboard provides, implements, and supports IBM Maximo and partnered solutions, and our expert service personnel are certified and focused in providing asset and maintenance management solutions with IBM Maximo. This has been our history since our founding in 2007 and, prior to that, our founders and key technical staff worked solely with Maximo for over 20 years. We decided to focus on Maximo because we believe it is the most capable,

comprehensive, and stable solution to asset and maintenance management available today. Our staff all have extensive experience with the product, hold multiple IBM technical certifications, and are committed to providing our clients with personalized service and support that is second to none. Maximo is our business!

Commitment to Conservation

Starboard consistently demonstrates a commitment to Sustainability and incorporates Triple Bottom Line methodology in both our Scope of Work for client projects as well as our day to day business operating processes and procedures. At Starboard, we take seriously the need to manage our use of resources and look for ways to shrink our environmental footprint. We are reducing the carbon footprint from energy use by optimizing the use of space for business needs as well as through a combination of energy efficiency measures throughout our operations, including telecommuting and efficient off-site travel utilizing carpooling. We take advantage of sustainable purchasing of goods and products for our business development and consulting services. We continue to seek ways to improve our overall sustainability, considering economic, ecology and social aspects to maximize and safeguard "profit, planet, and people".

Starboard Staff Experience and Certifications

Starboard consultants are certified IBM Maximo Deployment professionals and bring several decades of asset management experience to our clients. Starboard staff have a broad range of Maximo experience. Our experience gives us the capability to be more efficient and therefore more cost-effective for our clients. We can manage the full development life cycle, from project inception to post-implementation support, working closely with your technical and functional staff and end users. Our experience includes:

- Project/Program Management
- Readiness Assessments
- System Architecture Design/Hardware Specifications
- System Installation
- Industry Solutions Install (Maximo for Utilities, Spatial, Transportation, Mobile)
- Business Process Review Workshops
- Requirements Definition
- Upgrade Planning/Assessments
- Upgrade Projects (across all versions from Maximo 4.1.1 to Maximo 7.6)
- Functional and Technical Reviews
- Integrations to GIS (ESRI and Maximo Spatial)
- Integrations to Financials Applications
- Integrations to MS Project
- Integration to Customer Information Systems (CIS)
- Integrations to Document Management Systems
- Integrations to Supply Chain Applications (Oracle, Lawson, Dynamics)

- Data Conversions (from almost any electronically available data source)
- Maximo System Configurations (screen changes, application clones)
- Extending Maximo Business Objects (MBO's)
- Workflow Designer
- Actuate and BIRT Report Development
- Maximo Enterprise Adaptor and Maximo Integration Framework
- Data Collection Templates
- Test Plan Development
- Role-Based Training Plans
- Customized Training Materials (includes business processes and screen shots of the configured system)
- Scenario-Based Training Exercises and Role-Based Training
- IT Knowledge Transfer and Technical Training
- Post Implementation Support
- Patch and Revision Assistance
- Remote Administration
- Production Support

Starboard Staff Certifications

Starboard personnel have been certified with all Maximo versions from the initial release of the product by IBM. The certifications held by the Starboard staff include:

- Solution Advisors – Complete Maximo Product Line
- Solution Designers - Maximo Asset Management versions 3 through 7.6
- Certified Sales Professionals and Authorized Resale Agents – Complete Maximo Product Line
- Intelligent Operations Center Technical Professionals (IBM Smarter Cities)
- IBM Certified Maximo Instructors
- Deployment Professionals – Maximo Asset Management versions 3 through 7.6
- Deployment Professionals – Tivoli Process Automation Engine versions 6 through 7.6
- Deployment Professionals – Maximo Mobility and Other Third-Party Products
- Deployment Professionals - Tivoli Asset Management for IT
- Deployment Professionals – Tivoli Endpoint Manager
- Advanced Deployment Professionals Service Management Assets
- Advanced Deployment Professionals Service Management Financials
- Deployment Professionals – BIRT Report Development
- Deployment Professionals – Cognos Report Development
- Deployment Professionals – Actuate Report Development
- Professional Engineers
- Project Management Professionals (PMP)
- ITIL Fundamental and Intermediate Certified Professionals
- Prosci Change Practitioners

Starboard has a strong reputation for Maximo consulting and comes highly recommended by IBM and our clients. This reputation is built on the quality of our staff and their knowledge of the Maximo products both functionally and technically.

Water and Wastewater Utility Industry Experience

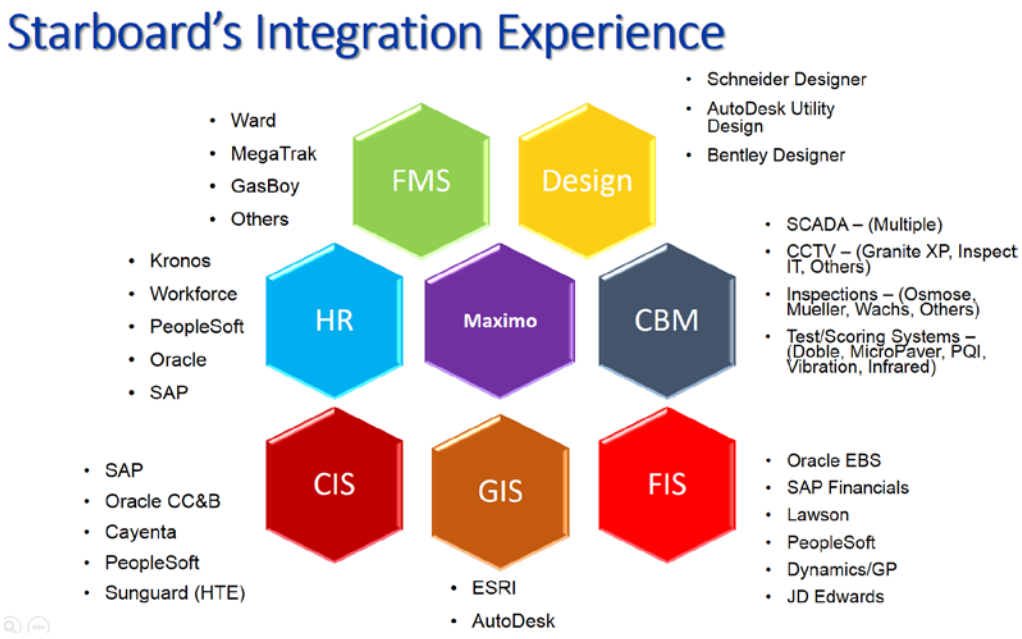
Starboard Consulting specializes in implementing Maximo for Utilities and Public Sector Clients. Starboard has performed Maximo implementations, upgrades and support services for more than 50 Wastewater Utility clients. We offer templates, based on our extensive experience in utility and water/wastewater best practices, that document standard work processes, and can serve as a foundation for implementation workshops.

Systems Integration

Starboard provides an asset management solution, Maximo, that is integrated seamlessly into other enterprise systems, offering advanced functions and features on a world-class architecture that will allow the City of Fort Lauderdale to grow, while meeting the challenges of asset management, work management and customer service in the future.

Any system can be integrated with Maximo, and vice versa, through the delivered Integration Framework. The Maximo Integration Framework (MIF) contains a set of applications that help you to integrate Maximo with your other enterprise applications, including business flows between the system.

Nearly all of Starboard's Maximo implementation and upgrade projects have involved multiple integrations, with most including implementation of Maximo Spatial to integrate with ESRI ArcGIS. The graphic below illustrates the many systems that we have developed integrations with.



Support Credentials – IBM Level 1 and Level 2 Support

Starboard is an IBM-credentialed and approved Level 1 and Level 2 support provider. IBM has verified that our resources collectively possess both broad and in-depth product expertise, including knowledge of product interdependencies and relationships for all supported programs and the ability to recognize and determine the nature and extent of reported problems.

Experience with Report development, configuration…

Maximo is delivered with both Cognos and Business Information Reporting Tool (BIRT). Starboard has skilled developers familiar with multiple reporting platforms, including Cognos and BIRT. We have a proven approach to define reporting requirements and we can easily assess what functionality within Maximo best fulfills the business requirements.

Our goal is to minimize configurations and customizations where possible. With the powerful query capabilities of Maximo 7.6, we often find that many reports can be managed by the users with saved queries, application downloads, and Query-Based Reporting. Where a new or modified report is needed, our team can leverage the abovementioned platforms to build complex reports that pull data from multiple Maximo tables and present it in a variety of formats, including lists, details, graphs and hyperlinks to more detailed reports and to Maximo applications.

There are approximately 150 BIRT Reports included with Maximo 7.6, with more available in add-on products. Starboard also understands the business intelligence capabilities available in Maximo 7.6 and can review the out-of-the-box intelligence metrics with the Core Team and design any additional points needed for specific work or asset management purposes

Experience with Mobile

The Starboard team includes certified Maximo and Mobile specialists. Starboard has implemented both IBM mobile products and finds the power of the *Everyplace* solution, delivered with Maximo Asset Management, to be a perfect match for organizations with multiple lines of business.

With Maximo 7.6, *Everyplace* is an available mobile platform for all licensed Maximo users. As a mobile extension to the desktop applications, *Everyplace* screens can be readily deployed using the same configuration tool (Application Designer) as desktop applications and inherit all other configurations that impact business logic and data validation. Since a large portion of the mobile user community has access to a reliable mobile connection utilizing 4G wireless cards, *Everyplace* can be a viable and economical solution to meeting mobile needs.

Starboard has implemented a mobile connected solution using IBM's Maximo *Everyplace* for multiple clients, most recently for a multi-service utility company also utilizing Maximo Spatial in the field. This provides a single mobile platform for work and asset management for crews and technicians. The solution provides a tailored solution that conditionally enables the data to be entered by the crews, based on the work order information itself, and allows users to perform a full suite of functions directly from the field. The users are completing work orders, performing network traces, editing attributes for Maximo and GIS features via direct update and redlines, locating addresses, viewing linked and as-built documents, capturing inspections, entering meter readings, creating new and follow-up work orders, creating child work orders for restoration services, and other necessary functions. The spatial information helps users make better-informed decisions and perform their job more efficiently. The *EveryPlace* solution is integrated within the utility's OMS/MDS system to provide work management within storm and emergency/compliance based response as well.

Starboard Experience

Starboard has a long history of helping our customers deploy Maximo asset, work, supply chain, and service management solutions across a wide range of industries including:

- Public Sector/Government
- Utilities (Water, Wastewater, Electric, and Gas)
- Higher Education
- Transportation
- Manufacturing

Starboard is committed to achieving the highest level of customer satisfaction, with quality-focused programs designed to maximize the use of Maximo Asset Management. As your solutions partner, we are dedicated to enabling your success. Our commitment is to quality, with on-time delivery and cost control. We ensure complete customer satisfaction through rapid issue resolution, and an accommodating change request process.

Keeping a project on track, on time, and within budget is key to delivering a quality information system that is usable and reliable. To achieve that, Starboard starts our project control methodology as soon as the project starts, and does not end until project close out.

Starboard's representative experience table is provided below for your review. Most of these projects have occurred within the last five (5) years.

STARBOARD PARTIAL CLIENT PROJECT LISTINGS		
INDUSTRY	**CLIENT**	**PROJECT SUMMARY**
Facilities and Utilities - Municipal Government	City of Corpus Christi, TX	Maximo Implementation, Integrations, and current upgrade to Maximo 7.6
Facilities and Utilities - Municipal Government	City of Roseville, California	Maximo 7.6 upgrade and implementation, Integrations to CIS, GIS, FMS, SCADA, and Vegetation Management with Mobile Solutions
Facilities and Utilities - Municipal Government	City of South Bend, Indiana	Maximo 7.5 implementation integrated with Sungard HTE Financials, GIS (IBM Spatial), and mobile connectivity using Maximo Mobile.
Facilities and Utilities - Municipal Government	Sarasota County, Florida	Maximo Implementation and Training
Utilities – Hydroelectric	Grand River Dam Authority, Oklahoma	Upgrade Maximo to Version 7.6 including Project Management and Training
Utilities – Electric	American Electric Power	Implementation of Maximo 7.6 for meter and fleet assets.
Utilities - Electric	CoServ Electric, Texas	Enterprise-wide implementation of Maximo 7.6.
Utilities – Electric	New York Power Authority, New York	Maximo 7.5 Upgrade, On-going Support, Enhancements and additional department-wide deployments
Utilities – Electric & Water	Kansas City Board of Public Utilities, Kansas	Maximo 7.5 Implementation
Utilities – Wastewater	Clark County Water Reclamation District, Nevada	Maximo Upgrade and Implementation to v7.5. Integrations to Oracle Financials, GIS Spatial, and SCADA.
Utilities – Electric and Water	Santee Cooper, South Carolina	Maximo upgrade from 4.1.1 to 7.5 and integration to Oracle Financials, with implementation of Transportation industry solution and Smart Cloud Control Desk. Maximo implementation across multiple business units, upgrade assessment, and upgrade planning from v4.1.1 to v7.
Utilities – Water	Eastern Municipal Water District, California	Maximo 7.6 upgrade and Cloud Hosting Assessment and Planning
Utilities – Wastewater	Green Bay Metropolitan Sewage District, Wisconsin	Maximo 7.6 Implementation, Integration, Training, and Support
Utilities – Water/Wastewater	City of Anchorage Alaska	Maximo 7.6 Functional and Technical Support
Utilities – Water Supply	Metropolitan Water District of Southern California	Ongoing Maximo Support
Utilities – Water	City of Asheville, North Carolina	Maximo upgrade from v6.2 to v7.5 and integrated Maximo to GIS (IBM Spatial) and CIS (HTE) with mobile work management. Starboard provided the configuration workshops, design, and configuration integrating Maximo and Esri ArcGIS Server. Starboard automated the creation and placement of work order features in the map with no user intervention.
Utilities - Electric, Gas, Water, Wastewater	Knoxville Utilities Board, Tennessee	Maximo 7.5 implementation including distributed linear asset management and GIS (IBM Spatial). Ongoing Support and Maximo System Enhancements. Maximo 7.6 upgrade
Utilities - Electric, Water, Wastewater, Reclaimed Water	Reedy Creek Energy Services/Improvement District, Florida	Maximo business process review and upgrade from v4.1.1 to v7 with integration to Great Plains. Ongoing Maximo support.

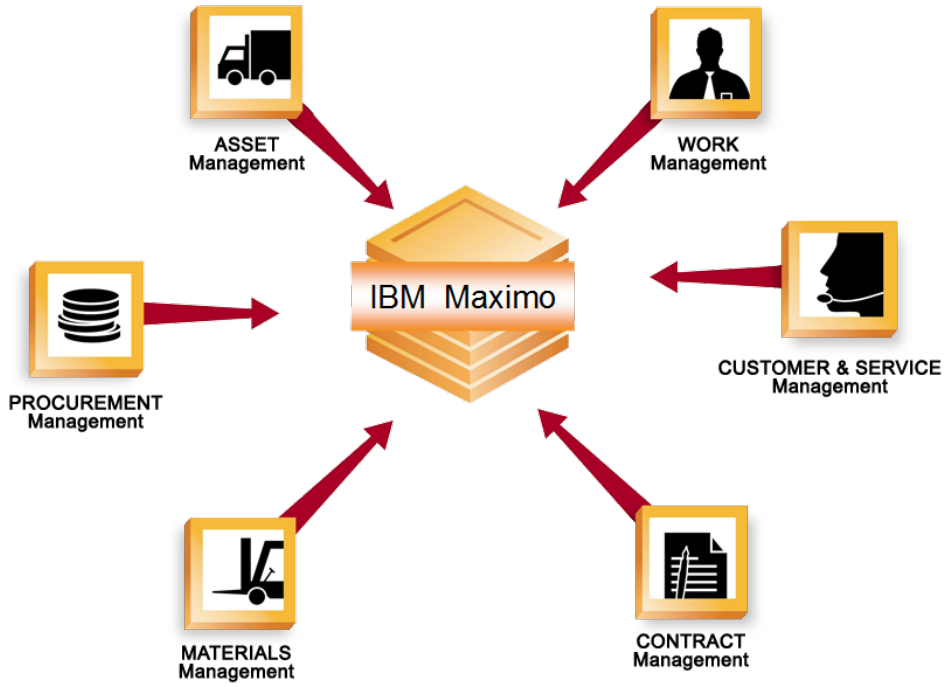
STARBOARD PARTIAL CLIENT PROJECT LISTINGS		
INDUSTRY	**CLIENT**	**PROJECT SUMMARY**
Utilities - Water, Wastewater, Electric	City of Lakeland, Florida	Maximo upgrade from v4.1 to 6.2. Maximo 6.2 implementation support, T&D subject matter expertise, business process review and solution design for integration to Designer and GO! Sync, as well as Syclo mobile implementation for customer service and energy delivery. Currently upgrading City-wide implementation to Maximo 7.6
Utilities – Electric	Empire District Electric, Missouri	Maximo implementation and upgrade from v 5.2 to v6 and later to 7.5 integrated to PeopleSoft Financials, PeopleSoft HCM and Osmose Pole Inspections; ongoing production support and enhancements. Bundle 3 – Plant Implementation and As-Built Estimating
Utilities - Electric	South Mississippi Electric Power Association	Maximo implementation and upgrade from v 5.2 to v6 integrated to Oracle Financials with mobile work management and calibration; ongoing production support. Maximo Upgrade from v6 to v7.5
Utilities - Electric	Hoosier Energy, Indiana	Maximo 6.2 implementation integrated to Great Plains with mobile inventory management; ongoing production support, upgrade to v7.5 and enhancements. Power Delivery – Phase 1 Currently upgrading to Maximo 7.6
Utilities - Electric	Georgia System Operations Corporation/Georgia Transmission Corporation	Maximo v5.2 implementation and upgrade to v6.2 and Maximo mobile. Production support and Maximo upgrade from v6.2 to 7.5. Maximo Report Development IT Support
Utilities – Electric	Oglethorpe Power, Georgia	Maximo upgrade to v6 for work management and supply chain with integration to Lawson Financials, upgrade to 7.5 and supply chain business process review and training program. Review and rework the Conduct of Maintenance.
Utilities – Water	San Diego County Water Authority, California	Maximo implementation integrated to SCADA and Fleet.
Utilities – Water	Honolulu Board of Water Supply, Hawaii	Maximo implementation integrated to GIS, CIS, J.D. Edwards (Purchasing/Inventory), and Kronos (timekeeping) with mobile work management.
Utilities – Water	Columbus Water Works, Georgia	Maximo implementation integrated with Lawson (Purchasing), Utility Billing (AVENIR), HR/Labor legacy systems, SCADA, GIS, and Fleet/Fuel Tracking.
Utilities – Water and Wastewater	City of Albuquerque, New Mexico	Maximo implementation integrated to Utility Billing, GIS, County and City legacy permitting and backflow management systems, and the New Mexico One Call System, and CIS (PeopleSoft) with mobile work management.
Utilities – Water and Wastewater	Philadelphia Water Department, Pennsylvania	Maximo implementation for water and wastewater plants and city-wide inventory management
Utilities – Wastewater	Sacramento Area Sewer District, California	Maximo 6.2 implementation integrated to GIS, Granite XP, Compass, and SCADA with mobile work management; ongoing production support.

3. Approach to Scope of Work

Proposed Solution Overview

Starboard Consulting (Starboard) understands that the City of Fort Lauderdale is seeking a scalable, off-the-shelf Enterprise Asset Management system that supports asset management, maintenance management, inventory management and related functions needed by the Public Works Department. Starboard further understands that the City is very GIS-centric, using ESRI ArcGIS for the whole enterprise, and that the solution must have the capability to integrate with GIS.

Starboard proposes that the City implement IBM Maximo, an Enterprise Asset Management System (EAM), as the software solution to achieve the City's stated objectives as outlined in the RFP. Specifically, our StarMax Solution ("StarMax") provides massive and immediate benefits for the City of Fort Lauderdale. IBM Maximo, unlike the traditional computerized maintenance management system (CMMS) that just focuses on maintenance activities, unifies comprehensive asset management life cycle and maintenance management on a single platform.



Maximo has the ability to grow and change over time as business needs dictate, serving the users well today while providing the foundation to expand to new areas in the future. Maximo is the market leader for Enterprise Work and Asset Management software as measured and ranked by industry analysts like Gartner. IBM Maximo has been in the Gartner Magic Quadrant for the past 17 years in a row. All of the leading analysts acknowledge that Maximo has held the position of global leader in the EAM marketplace.

Starboard will partner with City of Fort Lauderdale to implement IBM's Maximo Enterprise Asset Management solution, starting with StarMax, to support the business processes of the City's Public Works department. The resulting EAM deployment will achieve the City's goals to optimize system utilization for all users, improve response times, reduce errors, reduce manual efforts, improve analytical capabilities, and improve customer service.

Starboard concurs with the City's overarching project guidelines:

- **Maximize Maximo "off-the-shelf" functionalities -** Care will be taken when designing solutions to business requirements to vet them against delivered functionalities.
- **Minimize Maximo customizations to support simplified future upgrades -** Starboard will focus the configurations on tailoring the applications using the administrative toolsets delivered with Maximo, rather than customizing them. This will maximize the user experience while still ensuring upgrades are supported by IBM and that City staff can be self-sufficient in their ongoing maintenance and support of Maximo.
- **Minimize the City's total cost of ownership** without any degradation in performance and level of service. – Maximo is highly scalable and will allow the City to follow IBM's future upgrade path with minimal cost and business impact.
- **Tight integration with ESRI ArcGIS –** Maximo easily integrates with ESRI ArcGIS and includes an Integration Framework, which provides the ability to interface with enterprise systems such as the City's Stormwater modeling system which is being developed and implemented into GIS.

Starboard is proposing a total solution that addresses all the requirements stated in the RFP. Starboard will supply both the software and the implementation services that will achieve the City's objectives to optimize system utilization for all users, improve response times, reduce errors, reduce manual efforts, improve analytical capabilities, and improve customer service.

The Maximo solution, coupled with Starboard's Implementation approach (leveraging StarMax), addresses all the City's objectives as stated in the RFP:

- Off-the-shelf solution that will meet its core requirements out-of-the-box, with minimal modifications.
- A map-based user interface
- The system is scalable and has the ability to expand the technology and the functions.
- Highly intuitive system, from a user perspective, which can allow the City to take advantage of technology to improve departmental performance and efficiency.
- Easy access to the data for report and query generation without the need for a programming specialist.
- Support for user-friendly mobile technology for field crews using iPads and other mobile devices.
- The ability to plan, monitor and forecast annual work quantities and required resources (labor, equipment, material, budget) for a variety of infrastructure systems at a program level, including but not limited to: Right of Way Roadways, surfaces, sidewalk, ditches, storm conveyance systems, and assets such as water conveyance infrastructure (pumps, valves, main lines), trees, sewer (pumps, lift stations, lines).
- Asset tracking for specific assets (individually and by program) including the ability to track levels of service and life cycle data, condition assessments, pictures, warranty and licensing documentation, and completed project information.
- Work Order management (individually and by program).
- The ability to evaluate and modify work methods and performance to maximize efficiency of existing maintenance resources to ensure that program goals are met.

Best Product, Best Team, Best Approach = Great Results

What Starboard offers the City of Fort Lauderdale is unique in terms of product, team and implementation approach. IBM's product, Maximo, is second to none in the marketplace, and StarMax further enhances this standing. Our team, through our shared implementation experiences and industry and product expertise, is the best at what we do and our approach aligns with the City's vision and utilizes industry best practices.

Overview of Solution and Professional Services

Starboard offers innovative solutions, designed to fit each client's specific requirements, built on the IBM Maximo platform by our experienced team of consultants who understand the challenges of their industry. For the City of Fort Lauderdale, we recommend the implementation of StarMax, the power of IBM Maximo combined with the expertise of Starboard.

The StarMax Solution is built on the market leading software, IBM Maximo. StarMax provides an environment that we have pre-seeded with starter data, ISO-based work and asset standards, common utility-based functions, common integrations, and a mobile solution. This StarMax environment is Starboard's repository of the best Maximo offers the Utility industry in a scalable platform for both now and in the future.

StarMax can be offered in a SaaS model (Software as a Service) or as part of an On-Premise Solution, at the client's discretion. We recommend the On-Premise model, taking advantage of the system management and control processes already in place for the City's enterprise applications.

Starting with StarMax allows for a quick start to the implementation, allowing change management to begin immediately, at project inception, utilizing a fully functioning system containing at least a subset of the City's data. All configurations, workflows, and interfaces will be built on this StarMax foundation so that the City can make decisions based on touching the system or approving proof of concepts rather than approving a requirements document "in theory", with possible re-work required later when development completes. This supports the waterfall approach of completing tasks in linear order but provides a level of agility that will help the City users understand and take ownership of their new system faster.

A depiction of some of the key features is included in the picture below.

The benefits of Starboard's Approach to the City are:

1. **Faster Implementation –** StarMax is available immediately when installed with the implementation timeframe, dependent only on the provision of the identified City underground infrastructure data to Starboard for loading. This allows us to reduce the overall implementation timeline from a typical duration of 24 months down to approximately 12 months to achieve Go-Live, including a fully functional Maximo demo environment with a subset of the City underground data available within 3 months.

2. **Scalable Solution -** StarMax meets most of the goals and requirements documented by the City of Fort Lauderdale immediately. Once installed, new functionality and interfaces can be introduced, in phases, at a time that makes sense for the City from a change management perspective.

3. **Maximizes Productivity of City Resources** – For the initial phase, the City resources may continue their regular duties, with initial project time needed only for data review and training.

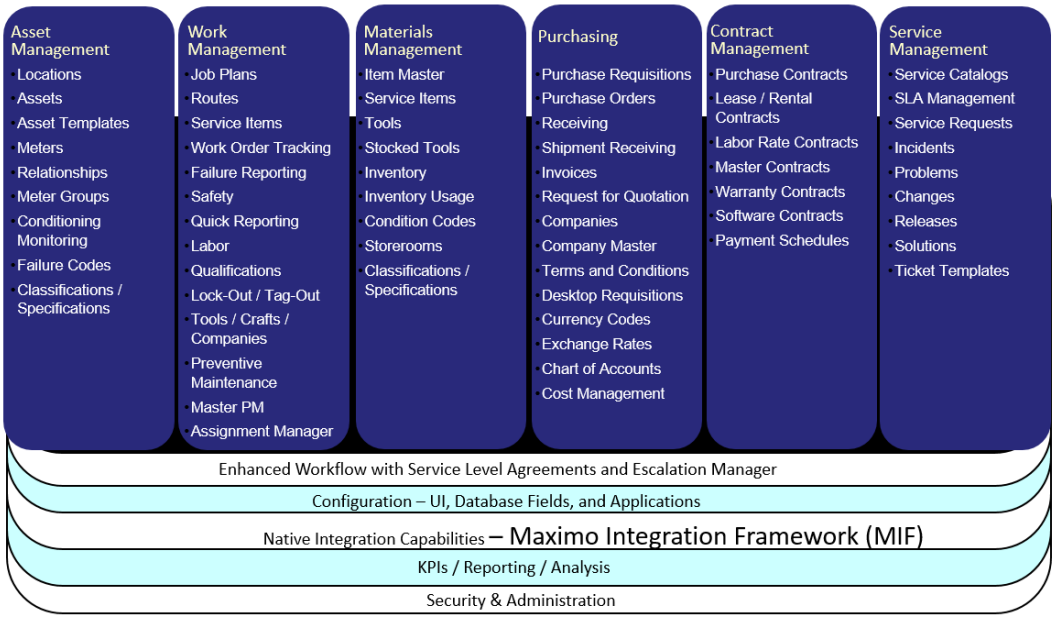
   Thereafter, StarMax will provide an environment for proof of concepts, demonstrations, and other activities that allow the City users to make decisions quickly, with confidence, as they can see the functionality or interface in action rather than being told about it with a description in a requirements document.

   We are recommending this approach because, in our experience, the ability to view and interact with a functional proof of concept is a far more productive approach for requirements approval.

4. **Starboard's Partnership with the City** – Starboard is a full-service implementer of Maximo and, therefore, can partner with the City to expand Maximo's support of the City's programs for the first and all phases of this project and any future initiatives. We know our Solution, we know your Industry, and we will get to know you as we implement the Solution. This inside knowledge will allow us to help the City expand its use of Maximo for the City's specific business processes efficiently and cost effectively.

StarMax Includes:

- Fully implemented and functional Work, Asset, Materials, and Services management modules. The entirety of the Maximo platform is available from Day 1 (picture below).



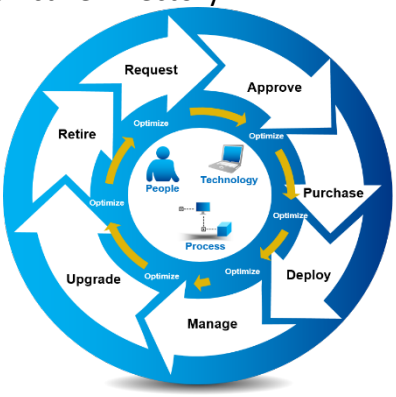
- Pre-configured data load objects and collection toolsets for the key data from the City. The key data elements include locations, assets, meters, PM's, items, inventory, companies (vendors/manufacturers), and work order history.

- Fully tested and ready to install. There is no need for unit, user acceptance, or other test activities. The users need only ensure the data important to them is correct and accessible to them in the system.

- Pre-seeded with foundational data for Utilities such as Crafts, Calendars, Shifts, asset classification and profile data, failure hierarchy for root cause analysis, asset risk (calculated as PoF x CoF with data entry points for each element), work types, work statuses, asset statuses, scored priority for backlog management, and Service Level Agreements for customer response management.

- Pre-configured for user management via third party tools such as Active Directory.

- Pre-configured for an industry best practices-based "to be" business process as well as the roles therein, such as: Asset Manager, Planners, Scheduler/Assigners, Crew Lead/Craft Worker (mobile), Inventory Manager**,** Warehouse Clerk, Buyer, and Administrators.



- Pre-configured with Dashboards and analytics for schedule compliance, labor utilization, backlog age, work breakdown by type or group, asset health/condition, item availability/stock-

outs, cost expenditures and compliance, major event reporting (main breaks, overflows, water quality, signal outages, street closures), response and resolution metrics, PM effectiveness, productive vs. non-productive time expenditures, and much more.

- Delivers with a web-based portal that allows unlimited internal users to create service requests.

- Delivers with email-listening capabilities for internal/external customers to create service requests.

- Delivers with Utilities-based capabilities including:
    - Main break reporting
    - SSO reporting
    - Hydrant availability tracking
    - Valve exercising
    - Site Restoration
    - Meter/ERT revenue-based device management and reporting
    - Backflow device management and auditing
    - Operations Event Management and Logging

- Delivers with over 150 pre-built reports with the ability for users to create their own list and detail reports based on pre-configured objects for location, asset, PM, item, or work.

- Pre-configured interfaces for:
    - Geographic Information System (GIS) for spatial work and asset management.
    - Financial Management System (FMS) to establish a common chart of accounts/General Ledger for the enterprise as well as to transmit actuals for costing such as labor, inventory, tools, and services.
    - Customer Information System/Customer Response Management for customer, work, and asset management.

- Delivers with a mobile solution that includes GIS-based mapping.

- Delivers with a backlog management Scheduling product that includes automated resource leveling and drag and drop capabilities.

- Delivers with a library of self-paced training executables to familiarize the users with the basics of Maximo and Maximo Spatial before Maximo is implemented.

- Scalable; growth requires only the acquisition of additional licenses.

IBM Maximo® Overview

IBM Maximo®, an Enterprise Asset Management System (EAM) from the IBM Tivoli suite of products, **unifies comprehensive asset life cycle and maintenance management on a single web-architected platform.**

IBM Maximo provides insight for all of your enterprise assets, their conditions and work processes, for better planning and control. IBM Maximo:

- **Manages asset** deployment, specifications, monitoring, calibration, costing and tracking from a single system
- Provides **work management** for long and short-term planning, preventive, reactive and condition-based maintenance, schedule management, resource optimization and key performance indicators
- Easily **integrates with ESRI ArcGIS** to allow users better visibility to asset and resource location.
- Can be **used remotely on any device**, including Smart Devices such as iPhone, Android, Surface Pro and others.
- Plans **inventory** to meet maintenance demand, making the right parts available at the right location when needed
- **Manages vendor contracts** with comprehensive support for purchase, lease, rental, warranty, rate, master, blanket and user-defined contracts
- Aligns service levels with business objectives by defining service offerings and **establishing service level agreements** (SLAs)
- Utilizes Cognos and open source Business Intelligence Reporting Tools (BIRT) for **reporting, monitoring Key Performance Indicators (KPIs)** and providing decision support with deep analytical capabilities.
- Adapts to changing business requirements and **integrates with other enterprise systems** through a flexible business process

IBM Maximo has been successfully deployed for decades, in hundreds of municipal public works and utilities throughout the United States to perform a myriad of activities, including the following:

- asset management, work management, inventory management, and incident management functionality for various departments

- internal department inspections and maintenance
- utility fee assessments
- regulatory reporting such as NPDES
- supporting developer project reviews and Capital Improvement Projects
- citizen requests for specific services capability (street pothole repairs, online service reservations, reports of malfunctioning street signals, etc.)

Maximo Spatial

Maximo Spatial is used to visualize the spatial relationships among managed assets and other mapped features.

Maximo spatial allows content from the production geographic information system (GIS) and from linked Maximo Asset Management records to be displayed. You can view assets in a geospatial context, so that you can easily and dynamically visualize the spatial relationships between your assets and the roads, buildings, pipelines, and other mapped features around them. You can also use Maximo Spatial as your master address system, enabling you to set standards so that address information is consistent across your organization. The address data can be used for assets, locations, service requests, and work orders to provide an additional layer of geospatial context to these records. The full range of asset-related data becomes available to GIS users to enrich their ability to analyze assets and determine action, if necessary. No duplication of data is required to support this unified view of asset and geospatial data.

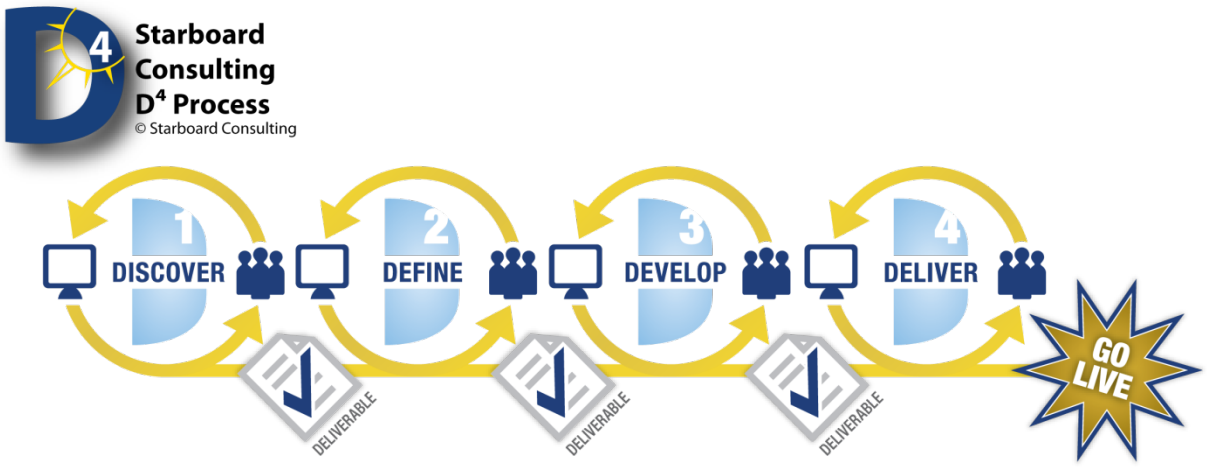
Relationships between Maximo GIS objects and GIS records can be visualized by highlighting related GIS features on the maps. Visualizing assets and work on a map allows you to see their proximity to one another so that you can make more cost-effective business decisions, such as when sending crews out to do repair work. Editing can be performed on the map, without leaving the Maximo Asset Management application. You can add work orders, service requests, assets, and locations directly on the map, and save the edits to share with other users.

Maximo Security provides the ability to control whether users can edit and link map features, and whether they have access to map feature classes. You can also restrict the map layers that a user can see on the map.

You can find GIS records using Maximo queries and GIS queries, or by address. Results of searches are clearly differentiated in the map view and are represented in a tabular view of the selected records. Maximo Spatial uses read-only data from many external GIS data sources, such as the flood plain data from the Federal Emergency Management Agency (FEMA) and other Web services.

Starboard Approach

Starboard believes the success of any technology project requires consideration of the people as much as the technology. We approach our projects as your partner, working together with the users every step of the way. Project success is accomplished by using our proven, systematic approach which has four critical phases that tie the people and technology components together throughout the project: Discover, Define, Develop and Deliver.



The D4 Process is as much about people as it is about technology. As we build the specific systems you need, we develop the capabilities of all end-users to fully take advantage of the technology. D4 = Results!

Discover

Before we make any recommendations, we gain a thorough understanding of your current situation. Starboard will interview the project stakeholders and review the existing:

- Business Processes
- Enterprise Integrations
- Reports, dashboards, and analytics
- Forms used by crews and crafts during work performance
- Work and asset standards
- Data, policies, and procedures that are in place to date as part of this phase.

In effect, we assess your work and asset management requirements and determine how those requirements relate to your goals. Out of this stage springs a documented assessment.

Define

The Define activity will encompass many pre-implementation tasks. The StarMax pilot will be implemented, which includes a fully functioning Maximo system with functionality specific to the Utility industry and pre-seeded with a subset of the City's data, such as a geographic subset of distributed assets from the Distribution and Collection systems. The City core project team and Starboard will determine the most appropriate initial data sets to ensure minimized timeframe for the initial implementation. A Core team from the City will be trained on the latest release of Maximo so everyone fully understands the product to enable decision-making on data loading/conversion, integrations, or business process changes (if needed).

The outcome of this activity is a set of detailed interface design documents with their complementary business requirements, a data conversion plan, and other recommended tailoring of the system based on user feedback.

Develop

To avoid disruption within your organization, we set up a staging platform to integrate City applications and data into the Maximo platform. We configure Maximo, interlacing processes, user interfaces, data loads, and integrations, for continuous verification by the user community. We then perform end-user acceptance testing.

The staging platform will be a development installation of the Maximo applications. Using this instance, we will use the integration framework to migrate system and static data, build the new application screens and configurations, and develop the reports, KPIs, and security. Changes will then be migrated to a testing instance to be utilized for user acceptance testing in preparation for the final cutover. When everything is in place, we're ready to deliver the implementation and "go-live."

Deliver

Once testing is complete, we prepare to launch the new platform. With all system changes completed, end-users are trained on your business processes, data, and screens just prior to the go-live. We will generate a training plan, customized training materials, and provide administrator and "Train-the-Trainer" training for the implementation and project teams.

We understand the complexities of data and process integration and stand committed to you throughout this process. We prepare the system documentation and list of implementation tasks, and then provide technical direction and assistance as configurations are moved into production and implementation tasks executed.

As part of the delivery, Starboard will also provide post go-live support to ensure that the new system is running as desired and all user expectations are successfully met.

By using this methodology, we have developed a scope of tasks that have proven to be the critical set of activities necessary for project success. These tasks are described in the section below.

Project Management

Project Management occurs throughout the duration of the project. All of Starboard's Project Managers are PMP-certified and, thus, Starboard's PM approach is based on the Project Management Institute Body of Knowledge (PMBOK). Our approach addresses each of the five major project management processes:

- **Project Initiation**: Establishing a contract to undertake the project and providing the project team with authorization to proceed.
- **Project Planning**: Defining and refining objectives and selecting the best course of action to attain the project objectives.
- **Project Execution**: Coordinating people and other resources to carry out the plan.
- **Project Control**: Ensuring that project objectives are met by monitoring and measuring progress regularly to identify compliance with and variances from the plan. Change and risk are continually identified and managed appropriately.
- **Project Closeout**: Formalizing acceptance of the project or phase by the client and bringing it to an orderly end.

By applying the Project Management Institute's (PMI's) methodology as the core of our project management practices, Starboard ensures that recognized best practices and standards are applied to the project.

The City and Starboard Project Managers will work collaboratively to provide oversight of the project following the project control and reporting methodologies as outlined in the RFP. The Starboard Project Manager will perform the coordination functions of the Facilitator to manage activity schedules and ensure meetings are on team calendars for the designated attendees.

The primary deliverables for the Project Management task include the project plan (WBS), communication plan, risk management plan, team roles & responsibilities, status reports, meeting minutes and invoices. The very first project activity will be a Project Kick-Off Meeting conducted on-site to introduce the project teams to each other and review the planned activities, scope, schedule, and budget with the project stakeholders. Subsequent weekly project status meetings will be led by the Starboard Project Manager.

Organizational Change Management Activities

Organizational Change Management (OCM) begins with project inception and then, ideally, becomes a habit that is adopted for continuous improvement across the enterprise. Starboard's proposed team is experienced in guiding clients through the changes necessary for

a successful implementation. Change management activities will be performed throughout the project duration to ensure OCM is kept current throughout the project lifecycles.

Moving approximately 400 people from one system to another is always a challenge, but those challenges can be transformed from walls, difficult to be scaled, to stepping stones on a path to success - that's the goal of Starboard's organizational change management program. From project initiation to post-deployment, our change management approach helps you create a smooth path that engages all levels of sponsors and stakeholders in planning, approach, and delivery, with specific interim assessments at each stage.

From our own experience and based on OCM best practices, established by some of the leading industry practitioners, we know that layered sponsorship and communication is key to successful change. If the people do not clearly see the full commitment of higher-level sponsors, chances of success diminish exponentially.

Generally, the phase activities critical to success include:

Phase	High-Level Description of Task	Deliverable
Initiation	Starboard will conduct interviews with key sponsors to identify change agents and potential champions, establish formal and informal coalitions, establish formal and informal communication streams and venues, identify potential areas of resistance, and understand priorities. Starboard will assess the readiness of the affected individuals by measuring and evaluating known and potential barriers as well as perceptions of the future state and general knowledge of the project at all organizational levels. The primary outcome is the completion of a Readiness Assessment to document the vision statement, goals of management, as well as the metrics they wish to measure the project by.	• Interview Notes
Planning	Change Management requires "Communicating the right messages to the right people at the right times using the right vehicles, with emphasis on two-way communication." (Project Management Solutions, 2013) Starboard will develop a Communication Plan to engage executive sponsorship, the user community, and project stakeholders using a variety of methods with differing delivery schedules to the various audiences that will be followed throughout the duration of the project.	• Communication Plan

Phase	High-Level Description of Task	Deliverable
Delivery	Starboard will work with the City Change lead to recommend job roles and map the organizational titles to the job roles, as defined in the work and asset management processes. These documents will provide the details necessary for Starboard to build a training plan, outlining the roles to include and the methodologies to be used for each, based on the best practices in adult learning as well as the outcomes of the Readiness Assessment. Starboard recommends a multi-media approach to adult learning that includes self-directed interactive online learning, step-by-step short demonstration videos and printable materials, as well as instructor-led web casts and classroom venues. Starboard also recommends ongoing education and knowledge transfer sessions in between the formal project training activities. The more Maximo is accessed by and discussed within the user community, the better the overall adoption process will be. Within this phase, Starboard will also begin ongoing project communications based on the Communication Plan.	• Training Plan
Monitor and Assess	Post-training and go-live monitoring is crucial to adoption of the new technology and will include daily/weekly stand up conferences (short and focused on end-user issues and experience) leading up to and after go-live for a pre-defined period of time. Monitoring and evaluation includes the definition of process metrics to determine the overall success of the stabilization effort. Finally, Starboard will conduct a project closeout that includes lessons learned as well as areas of continued risk.	• Project Closeout

Phased Implementation Approach

Phase 1

Starboard proposes a phased implementation approach. Phase 1 will include implementation of Starboard's StarMax Solution. This implementation will provide full functionality of Maximo, preconfigured to support industry best practices. Starboard will partner with the City to identify a suitable candidate, such as a geographic subset of distributed assets from the Distribution and Collection systems, as the focus for this initial phase of the implementation. While Starboard will identify the data requirements for this initial phase, it will be the City's responsibility to collect the identified data in Starboard-provided spreadsheets. Once the City-provided data is loaded into Maximo, this will be utilized to familiarize the City with Maximo's delivered functionality and provide a starting point for the remaining activities of the implementation.

Phase 2

Phase 2 will include implementation of Maximo for remaining Collection and Distribution systems assets and infrastructure, Stormwater assets and infrastructure, and other distributed asset classes that are managed by the City Public Works departments in support of Water, Wastewater and Stormwater Utilities. In addition, in Phase 2, integration will be implemented with Maximo and ESRI ArcGIS and Lawson Financials.

Work Execution Phase – Build, Test and Implement for Phase 1

1. Phase 1:

The Work Execution phase includes the activities from Starboard's Develop and Delivery methodology phases.

1.1. Task – Project Kick Off

Starboard will prepare and present an overview of the project goals, approach, expectations and schedule to the Stakeholders and Core team.

Starboard will develop a presentation for and facilitate a one-day on-site meeting with the City's core team and key stakeholders to discuss and review the project objectives, goals, scope, schedule, resource commitment, communication plan, risk plan, and change management processes.

1.1.1. Deliverables

- Kick-Off Meeting Presentation
- Kick-off Meeting Agenda

1.1.2. Assumptions

Starboard assumes the City Project Manager will be responsible for communication with the appropriate participants and ensuring their participation in the scheduled workshop.

1.2. Task – Technical Architecture Review

Starboard will provide a technical questionnaire for the City to complete to provide details on the reliability and availability requirements as well as the physical and virtual infrastructure upon which Maximo will be implemented. Upon receipt of this questionnaire, Starboard will utilize the technology stack information included within the RFP to develop a draft Maximo Architecture Design document for the City staff to approve prior to acquisition of the hardware or creation of virtual environments. This will document a scalable, high-availability environment.

Starboard does not see any major hurdles with the technology stack details as listed, but there will be discussions needed around specific platform versions based on the IBM compatibility matrix available for the version of Maximo 7.6 to be installed for the City.

Starboard will conduct a one-day on-site architecture and licensing recommendation/review session with the City's IT Department and Project Staff to understand the infrastructure requirements for the Maximo environment including:

- **Capacity** – system performs to the level expected by the users during times of high demand.
- **Continuity** – The EAM System is able to recover per business requirements and continue to provide service to the users should a serious incident or disruption occur.
- **Availability** – The EAM system is available when users access the system. This workshop will include discussions on reliability, maintainability, serviceability, and resilience. It will also include a discussion of other enterprise systems to which Maximo will interface and the availability requirements of the data and the interface points.
- **Licensing** – finalize licensing counts and add-on solutions necessary to support the City's business needs.

1.2.1. Deliverables

- Architecture and Environment Requirements Document
- Environment Questionnaire

1.2.2. Assumptions

Starboard assumes the City will make necessary IT (networking, database management, application server management) staff available for the on-site Architecture Review workshop.

Starboard assumes the City will have filled out and returned the technical questionnaire at least one week prior to the on-site Architecture Review workshop.

1.3. Task – Install Maximo Applications

Starboard recommends that the City implement a single environment to support Phase 1 StarMax. The City will be responsible for acquiring the hardware and installing the operating system and necessary software in advance of the Maximo installation. As part of this task, Starboard will provide an installation check list that outlines the software to be downloaded from IBM, server setup steps and other tasks necessary to prepare for the installation.

The City will prepare the environment for first use according to the specifications documented in the Architecture Design. Once complete, Starboard will install Maximo 7.6.X (the latest release currently available from IBM Tivoli) and WebSphere on the City's servers to create a DEVELOPMENT instance of Maximo.

Starboard will document the environment post-installation to capture the details necessary for long-term maintenance and support. Starboard will install the following products:

- IBM Asset Management (includes the BIRT Report Server and WebSphere application server)
- Maximo Spatial
- Maximo Scheduler/Graphical Dispatcher

1.3.1. Deliverables

- Maximo Environment
- Environment Configuration Document
- Installation Checklist

1.3.2. Assumptions

- Starboard assumes an on-premise installation as part of the scope of work.
- Starboard assumes all hardware is available and prepared for the Maximo installation prior to Starboard beginning the installation.
- The City will be responsible for hardware procurement and/or Virtual Machine creation with the appropriate operating system installed.
- Starboard assumes that the City will ensure the application, database, and administration servers meet the minimum requirements as published by IBM for their environment and operating system.
- The City will be responsible for creating the database and any upgrade activities planned for the existing database instances as needed.
- The City IT will be responsible for refreshing the database environments from the existing Maximo production instance as needed during the upgrade activities.
- The City will provide Starboard with VPN access and administrative accounts to the new 7.6 environments.

- The City will be responsible for performing DBA functions such as creating databases and schemas and assisting with other database requests as needed during the upgrade activities.
- The City will be responsible for providing hardware and networking expertise as needed during the installation activities.
- The City will be responsible for all desktop and mobile device and equipment configurations to ensure they are compatible with the best practice minimum standards as published by IBM.
- The City will provide temporary databases, access to Windows virtual machines, and other temporary hardware or software as needed during the upgrade activities. These temporary configurations will only be used during the project activities and will be available to The City once the production upgrade has completed.

1.4. Task – Legacy Data Review and Requirements Workshop

Starboard will conduct a workshop with the City for identifying legacy data to be migrated to Maximo. Starboard will identify the detailed requirements for each data set to be loaded into Maximo. Starboard will develop a data migration plan, addressing data migration requirements for each data set and determination of any requirements for migration of historical and/or in-flight data.

1.4.1. Deliverables

- Data Migration Plan

1.4.2. Assumptions

Starboard assumes the following data sets will be loaded for the pilot subset of the City's underground infrastructure:

- Assets
- Locations
- Classifications
- Failure Hierarchy
- Crafts
- Calendar
- Labor and User records for Core Team
- Item Master
- Inventory (balances and costs)
- Job Plans
- Preventative Maintenance Schedules
- Work and Asset Standards

1.5. Task – Data Migration and Loading

Starboard will provide data loading format and requirements which the City will adhere to in providing data from Hansen and other sources for loading into the Maximo development environment utilizing the Maximo Integration Framework (MIF).

Starboard uses the MIF tool provided by IBM because it uses the Maximo Business Objects (MBOs) to populate data into the database tables which enforces the same level of quality as if the user were typing it directly into the application screen. Any records not meeting the criteria for insert or update into the system are noted in error and audit tables, with the reason for failure, so that they can be re-processed in successive iterative loads.

Starboard will facilitate an In-Progress Review (IPR) session at the mid-point of the data migration effort with the Core Team to review the data as it is loaded. At this point in the project lifecycle, a working system is available with the City foundational data and available for use as a non-production system. This will allow the City to become comfortable with the delivered functionality of Maximo as the implementation progresses.

The deliverables from this activity will be standardized data that can be migrated to successive environments for delivery and deployment activities.

Starboard has converted millions of records from a wide variety of legacy applications in our years of implementing Maximo. A key success factor in that process is the involvement of client staff in the data process. As the owners and users of the data, client input is critical in compiling a complete and accurate set of records. The most common issues are generally around consolidating records and resolving data conflicts across multiple sources. With a partnership of Starboard and City staff, any issues encountered can be managed and mitigated.

1.5.1. Deliverables

- Data Migration Plan

1.5.2. Assumptions

Starboard will load the data provided by the City up to 2 times into the Maximo Development environment, once for review by City staff, and a second time to address any issues reported after the review. If the City requires additional loads due to data quality, that effort will be considered outside of this scope of work.

Up to 10,000 assets from 5 feature classes will be loaded to Maximo as part of the Phase 1 pilot. Starboard recognizes this will be a subset of the City's underground infrastructure, however, this quantity of assets will provide a representative sample and achieve the goal of using the StarMax Solution to model processes as Phase 2 of the implementation progresses.

1.6. Task – Maximo Pilot Familiarization

Starboard will conduct a three-day hands-on facilitated overview session for the Core Team to review the StarMax functionality that applies to the City's work and asset management processes. This will position the Core team with a base level of understanding of the Maximo

applications and functional capabilities, in an environment loaded with City data and lead to better understanding and participation in workshops.

Starboard has four Interactive On-Line Learning (IOL) modules that we will provide to the City Core Team in advance of the overview workshop so that they have a basic understanding of Maximo query and navigation capabilities before attending the on-site workshop.

1.6.1. Deliverables

- Core Team Training Session
- Four On-Line Learning Modules:
    - Maximo 7.6 Overview
    - Maximo 7.6 Navigation
    - Maximo 7.6 Queries
    - Maximo 7.6 Reporting Overview

1.6.2. Assumptions

The City core team will have watched the IOL's in advance of the Pilot Familiarization sessions.

Work Execution Phase – Build Test and Implement for Phase 2

2. Phase 2:

Phase 2 will utilize the StarMax Maximo solution established for the pilot as the implementation progresses throughout the Utility.

2.1. Task – Phase 2 Kickoff

Starboard will prepare and present a review of the Phase 1 Pilot implementation and overview of the Phase 2 project goals, approach, expectations and schedule to the stakeholders and core team.

Starboard will develop a presentation for and facilitate a one-day on-site meeting with the City's core team and key stakeholders to discuss and review the project objectives, goals, scope, schedule, resource commitment, communication plan, risk plan, and change management processes.

2.1.1. Deliverables

- Kick-Off Meeting Presentation
- Kick-off Meeting Agenda

2.1.2. Assumptions

Starboard assumes the City Project Manager will be responsible for communication with the appropriate participants and ensuring their participation in the scheduled workshop.

2.2. Task – Stakeholder Analysis

Starboard will conduct a week-long series of interviews with project stakeholders to better understand their objectives and expectations of the project, along with challenges and pain points experienced today.

2.2.1. Deliverables

- Interview Meeting Minutes with identified risks, challenges and requirements

2.3. Task – Review Business Processes

Starboard will conduct business process review sessions for up to 1 week to review the existing documented business processes with the core team and appropriate subject matter experts to ensure Starboards understanding of the processes as well as to recommend changes if needed.

2.3.1. Deliverables

- Business Process Recommendations

2.4. Task – Install Maximo Applications

Starboard recommends that the City implement 3 additional environments (Testing, Training, and Production) as this will allow for best practice as integrations and configurations are applied and data is loaded. These activities will be initially performed in the Development environment. Then, once reviewed through Starboard's Quality Assurance processes, migrated to the Testing environment, where the project team will have a chance to review and test the data and configurations. After successful testing is confirmed, the configurations and data will be migrated to the Training environment and, eventually, Production. Starboard will design the environment architecture according to the best practices from IBM as well as our years of experience in designing scalable environments for our clients.

The City will be responsible for acquiring the hardware and installing the operating system and necessary software in advance of the Maximo installation. As part of this task, Starboard will provide an installation check list that outlines the software to be downloaded from IBM, server setup steps and other tasks necessary to prepare for the installation.

The City will prepare the environments for use according to the specifications documented in the Architecture Design. Once complete, Starboard will install Maximo 7.6.X (the latest release currently available from IBM Tivoli) and WebSphere on the City's servers to create TESTING, TRAINING and PRODUCTION instances of Maximo.

Starboard will document the environment post-installation to capture the details necessary for long-term maintenance and support. Starboard will install the following products:

- IBM Asset Management (includes the BIRT Report Server and WebSphere application server)
- Maximo Spatial
- Maximo Scheduler/Graphical Dispatcher

2.4.1. Deliverables

- Maximo Environments
- Environment Configuration Document
- Installation Checklist

2.4.2. Assumptions

- Starboard assumes an on-premise installation as part of the scope of work.
- Starboard assumes all hardware is available and prepared for the Maximo installation prior to Starboard beginning the installation.
- The City will be responsible for hardware procurement and/or Virtual Machine creation with the appropriate operating system installed.
- Starboard assumes that the City will ensure the application, database, and administration servers meet the minimum requirements as published by IBM for their environment and operating system.
- The City will be responsible for creating the database and any upgrade activities planned for the existing database instances as needed.
- The City IT will be responsible for refreshing the database environments from the existing Maximo production instance as needed during the upgrade activities.
- The City will provide Starboard with VPN access and administrative accounts to the new 7.6 environments.
- The City will be responsible for performing DBA functions such as creating databases and schemas, refreshing the database environments from the existing Maximo production instances, copying schemas from one environment to another, taking back-ups, and assisting with other database requests as needed during the upgrade activities.
- The City will be responsible for providing hardware and networking expertise as needed during the installation activities.
- The City will be responsible for all desktop and mobile device and equipment configurations to ensure they are compatible with the best practice minimum standards as published by IBM.
- The City will provide temporary databases, access to Windows virtual machines, and other temporary hardware or software as needed during the upgrade activities. These temporary configurations will only be used during the project activities and will be available to The City once the production upgrade has completed.

The City will prepare the environments for first use according to the specifications documented in the Architecture Design. Once complete, Starboard will install Maximo 7.6.X (the latest release currently available from IBM Tivoli) and WebSphere on the City's servers to create TEST, TRAIN and PRODUCTION instances of Maximo.

Starboard will document the environment post-installation to capture the details necessary for long-term maintenance and support. Starboard will install the following products:

- IBM Asset Management (includes the BIRT Report Server and WebSphere application server)
- Maximo Spatial
- Maximo Scheduler/Graphical Dispatcher

2.4.3. Deliverables

- Maximo Environments
- Environment Configuration Document
- Installation Checklist

2.4.4. Assumptions

- Starboard assumes an on-premise installation as part of the scope of work.
- Starboard assumes all hardware is available and prepared for the Maximo installation prior to Starboard beginning the installation.
- The City will be responsible for hardware procurement and/or Virtual Machine creation with the appropriate operating system installed.
- Starboard assumes that the City will ensure the application, database, and administration servers meet the minimum requirements as published by IBM for their environment and operating system.
- The City will be responsible for creating the database and any upgrade activities planned for the existing database instances as needed.
- The City IT will be responsible for refreshing the database environments from the existing Maximo production instance as needed during the upgrade activities.
- The City will provide Starboard with VPN access and administrative accounts to the new 7.6 environments.
- The City will be responsible for performing DBA functions such as creating databases and schemas, refreshing the database environments from the existing Maximo production instances, copying schemas from one environment to another, taking back-ups, and assisting with other database requests as needed during the upgrade activities.

- The City will be responsible for providing hardware and networking expertise as needed during the installation activities.
- The City will be responsible for all desktop and mobile device and equipment configurations to ensure they are compatible with the best practice minimum standards as published by IBM.
- The City will provide temporary databases, access to Windows virtual machines, and other temporary hardware or software as needed during the upgrade activities. These temporary configurations will only be used during the project activities and will be available to The City once the production upgrade has completed.

2.5. Task – Integration Design Workshops

2.5.1. ERP (Lawson) Integration Design

Starboard will lead up to two days of work sessions with the Core Team to identify candidate ERP/Maximo Interface touch points. Starboard recognizes that Lawson is planned for implementation, but will not be in place in the early stages of this project. Starboard will document the recommended "seam" between Maximo and ERP as well as the individual interface touchpoints. These recommendations will be revisited when the Lawson Implementation is at an appropriate point to support further discussion of this interface.

2.5.1.1. Deliverable

- Maximo/Lawson Interface Recommendations document

2.5.1.2. Assumptions

Starboard assumes the City will be ready to proceed with Lawson Integration Design work sessions per the proposed Maximo implementation project schedule.

Starboard assumes the Lawson Implementation will have sufficiently progressed to support the development of interface requirements between Maximo and Lawson.

Starboard assumes the following interface touch points between Maximo and IFAS:

- Item Master synchronization
- Material Requests (Central Stores)
- Procurement (Purchase Requisitions and Purchase Orders)
- Chart of Accounts
- Vendors

2.5.2. ESRI GIS Integration Design

Starboard will conduct a three-day requirements and design session, with the appropriate GIS and City subject matter experts (SME's), resulting in the development of the interface functional and technical design document. This workshop will include a review of the existing data stored in the GIS for the following feature classes:

- Valves
- Hydrants
- Pump Stations
- Storage Tanks
- Backflow preventer valves
- Lift Stations
- Manholes
- Force Mains
- Gravity Mains
- Pipelines

The workshop will also focus on the business process for asset creation, modification, and decommission and the corresponding roles and responsibilities between the two systems.

The workshop will also review Work Request and Work management processes requiring a map based view from within Maximo. This discussion will include a definition of the data quality thresholds necessary to integrate the systems and have maintainable assets with data shared in both GIS and Maximo.

The GIS interface will include integration points for:

- Locations
- Assets
- Work Orders
- Service Requests

For purposes of costing, the following is a list of functionalities that Starboard will configure on the City's behalf as part of the Maximo Spatial implementation:

- Creation of New Assets and Locations from GIS to Maximo Using Maximo Spatial Adapter
- Default Cross Reference Table Processing to Populate Pertinent Fields on the New Locations and Assets Created
- Linking of Hierarchical Assets to GIS Feature Classes
- Decommission of Assets in Maximo Based on Deletions or State Changes in GIS
- Out-of-the-Box Creation of Spatial Points for Work Orders and Service Requests Written Against GIS Assets

- Asset Swapping Processes – This functionality exists in Core Maximo but is typically modified in GIS-based implementations to preserve the positional point on the map while swapping the equipment in service at that positional location.

Starboard will also capture any configurations necessary to Maximo in support of the interface requirements in the Design document.

2.5.2.1. Deliverables

- Enterprise Functional and Technical Design Document for the GIS Interface

2.5.3. Maximo Spatial Adapter Assumptions

Starboard assumes the Maximo Spatial Adapter will be used for integration points between Maximo and GIS and that the objects as delivered with the Adapter will be utilized.

Further, the Maximo Spatial map services are provided to the users by registering GIS map services within the Map Manager and thus all map service development will be the responsibility of the City GIS development team.

2.5.3.1. Assumptions

- Starboard assumes the requirements for the Interface between GIS and Maximo are:
    - Common Identifier (Cross Reference Key) to support data sharing between Maximo and ESRI
    - Work Requests, providing the ability to create or open a work request from within Maximo in a map-based view and prepopulate with information from Maximo and GIS
    - Work Orders, providing the ability to reference and view Work Orders from within Maximo in a Map-based view, along with related and nearby assets and infrastructure
    - Asset Interface, providing the ability to enter data once and initiate the creation or update of Asset data in both Maximo and ESRI
- The Maximo Spatial map services are provided to the users by registering GIS map services within the Map Manager and thus all map service development will be the responsibility of the City GIS development team.

2.6. Task – Integration Development

2.6.1. Task – Implement Lawson Interface with Core Team and Unit Test

Starboard will utilize the Maximo Integration Framework as per the Technical Design Document for the purposes of:

- Item Master synchronization
- Material Requests (Central Stores)
- Procurement (Purchase Requisitions and Purchase Orders)
- Chart of Accounts
- Vendors

Starboard will document the configurations applied to support the defined interfaces for configuration management as well as migration packages for deployment activities.

Starboard will facilitate an In-Progress Review (IPR) session bi-weekly with the Core Team. This will allow the City and Starboard to jointly review the interface transactions and configurations, allowing Starboard to be reactive in the event changes are required and minimizing future rework.

Once the interface points have been Starboard tested, Starboard will conduct bi-weekly facilitated testing sessions with the Core Team and interface SMEs, in the development environment, and will resolve any defects found before approval to migrate the Interfaces to the TEST environment for user acceptance testing.

2.6.1.1. Deliverables

Documentation detailing the configurations applied to support this interface.

2.6.1.2. Assumptions

Starboard assumes fully functioning Lawson Development and Test environments will be ready to support interface development and testing activities per the proposed Maximo implementation project schedule.

Starboard will be responsible for the Maximo side of the Lawson/Maximo Interface. Starboard assumes the City is responsible for any updates to Lawson required to support this interface.

Starboard assumes that the City SME resources will be made available for testing on a timely basis so that the unit testing duration does not exceed 2 weeks.

2.6.2. Task – Implement ESRI Interface with Core Team and Unit Test

Starboard will leverage Maximo Spatial and supporting interfaces with GIS as per the Technical Design Document for the purposes of:

- Common Identifier (Cross Reference Key) to support data sharing between Maximo and ESRI

- Work Requests, providing the ability to create or open a work request from within Maximo in a map-based view and prepopulate with information from Maximo and GIS
- Work Orders, providing the ability to reference and view Work Orders from within Maximo in a Map-based view, along with related and nearby assets and infrastructure
- Asset Interface, providing the ability to enter data once and initiate the creation or update of Asset data in both Maximo and ESRI

Starboard will document the configurations applied to support the defined interfaces for configuration management as well as migration packages for deployment activities.

Once the interface points have been Starboard tested, Starboard will conduct on-site facilitated testing sessions with the Core Team and interface SMEs, in the TEST environment, and will resolve any defects found before approval to migrate the Interfaces to Production.

2.6.2.1. Deliverables

Documentation detailing the configurations applied to support this interface.

2.6.2.2. Assumptions

- Starboard will be responsible for the Maximo side of the ESRI GIS/Maximo Interface.
- Starboard assumes the City is responsible for any updates to ESRI GIS required to support this interface.

2.7. Task – Test Planning

Starboard will develop a Master Test Plan that outlines all of the Phase 2 testing to be performed including system, integration, regression, performance, and user acceptance. The Plan will include "go/no go" criteria as well as requirements considered critical to Maximo functioning. This plan will include iterative testing strategies for critical business functions and interfaces as per the City's criteria.

2.7.1. Deliverables

- Master Test Plan
- Test Scenarios

2.8. Task – Deploy to Test

Starboard will migrate all tailored objects to the Test environment using Maximo Migration packages and other Maximo Administrative tools in advance of the Core Team performing unit testing. The deliverables for this activity are the Migration Packages themselves as well as a final list of configured objects for configuration management.

In this task, Starboard will develop a Migration Plan and Checklist that includes a back-out plan as needed for each environment migration. The primary tools for migration will be defined, with the preferred toolset being the Maximo Migration Manager wherever possible. This Migration Plan and Checklist will be utilized for each migration so that both the packages and the plan are perfected with each successive migration.

2.8.1. Deliverables

- Migration Checklist

2.9. Task – User Acceptance Testing

Starboard will facilitate up to five (5) weeks of User Acceptance Testing and System Integration testing sessions as per the Master Test Plan.

Starboard will correct any defects in the testing environment and will log change requests for the City Change Control Board review. Starboard will update the Migration Packages and schedule fix deployments periodically throughout the UAT and Integration testing sessions.

At the end of the testing activities, the user community will give a "Go/No Go" decision to proceed with deployment activities.

2.9.1. Deliverables

- Issues Log
- Testing Results
- Enhancement Logs

2.9.2. Assumptions

- City testers will be responsible for:
    - documenting testing outcomes
    - documenting issues in the centralized project control site
    - approvals for production deployment
- Starboard cannot be held responsible for any defects in the Maximo applications as delivered from the vendor, IBM Tivoli. If any defects are found then The City will open a PMR with IBM support and Starboard will assist The City OPP staff as needed with log files and communicating findings to the L2 or L3 IBM support personnel.
- The City PM will be responsible for organizing the user test sessions and ensuring user participation.

2.10. Task – Deploy to Train/QA

Starboard will migrate all tailored objects to the Training environment, using the Test environment Maximo Migration packages, in advance of the end user training. The deliverables

for this activity are the Migration Packages themselves as well as a final list of configured objects for configuration management.

2.10.1. Deliverables

- Deployment Checklist
- Application Configuration Document

2.11. Task – Training Plan

Training will be a key component to the success of the system. Maximo training will be customized to the roles and responsibilities of the students, and utilize materials that are based upon the City's data, screens and work scenarios. Starboard will work with the City to create a role-based training plan and approach to ensure that all the City's users can be adequately trained in Maximo prior to go-live.

The Training Plan will start with the completion of a training matrix similar to the table below that lists the courses to be offered and the security roles defined by the organization, then identifies for each role the specific classes necessary for users to perform their daily activities. This matrix ensures that all users receive adequate training but are not over-trained with details that are not relevant to their work activities.

Once the training matrix is completed, the Training Plan can be developed to include needed materials, classroom logistics, scheduling and other details. During the definition phase of the implementation a more detailed training program catered to the City will be developed. All training should be offered as close to the go-live as possible.

Training Requirement	Field Crews	Schedulers	Supervisors	Managers	Customers
Navigation – Maximo overview, general navigation, start centers	X	X	X	X	X
New Work – creating new work orders	X	X	X	X	X
Planning/ Scheduling – work order tracking, planning labor, materials and tools, scheduling work		X	X	X	
Work Close-out – failure reports, recording actuals, documenting work performed	X	X	X	X	
Asset Management – locations, assets, PMs, routes, job plans, safety plans, meters, condition monitoring, warranty contracts			X	X	

Training Requirement	Field Crews	Schedulers	Supervisors	Managers	Customers
Purchase Requests – new purchase requests		X	X	X	
Administration – classifications, bulletin boards, KPI's, start center development			X	X	
Reporting – download, QBR, running reports with BIRT	X	X	X	X	

*Sample Training Matrix

2.11.1. Deliverables

- Training Plan
- Training Syllabus

2.12. Task – Develop Training Materials

Starboard has designed learner-centered, role-based training that minimize the time spent in traditional classroom sessions and maximize the learning potential and performance of the end-user. Our training methodologies allow the City's users to gain the skills, knowledge and experience they need to do the job correctly and more efficiently.

Role-based courses will be designed and delivered as targeted learning opportunities for users and groups that perform specific roles and functions in Maximo. For instance, a shift supervisor will create work orders, plan, review and close work orders. Supervisors will learn to perform those tasks in appropriate work order applications whereas a maintenance technician will learn to query Maximo for their work orders, print the work order, report their time, and complete a work order.

2.12.1. Deliverables

- Training Materials

2.12.2. Assumptions

- The City will be responsible for printing and distribution of Training Materials

2.13. Task – Maximo Administration Training

Maximo system administrator training consists of hands-on training for qualified administrators and will serve as knowledge transfer to the City's system administrators. This course will be tailored to the City's needs, with the available course materials covering all of the Maximo

Administrative Modules including system administration, application design, security, user restrictions, workflow, KPI, start centers, conditional expressions, migration management, data loading (export, import), automation scripting, conditional displays and field management, database configuration and management, the included Maximo Integration Framework, and escalations/notifications, as well as basic stop/start and other WebSphere management activities.

The administration training is an on-site activity for up to four days, providing hands-on experience for the trainees in their own environment.

2.13.1. Deliverables

- Maximo Administrative training presentation
- Review of the location and purpose of the various IBM administrative guides and knowledge bases

2.13.2. Assumptions

- Starboard assumes the City will provide sufficient training facilities that can accommodate an instructor and 10 class participants for all training sessions conducted. Starboard assumes that each training room will be equipped with the following:
    - One Instructor work station with access to Maximo 7.6 training environment
    - One projector connected to Instructor work station
    - 10 Student work stations with access to Maximo 7.6 training environment
    - Internet access
    - Whiteboard and/or flip chart and easel for note taking
- The City Project Manager will be responsible for coordinating the class schedules, inviting participants, communicating with the user community, and providing a list of scheduled participants to Starboard in advance of each training session.
- The City will be responsible for printing and distribution of Training Materials

2.14. Task – Deliver End-User Training

Starboard assumes it will train approximately 300 users in the functions they will perform within Maximo. Starboard will use a blend of instructor-led classes and workshops, over-the-shoulder coaching and go-live mentoring, backed up by reusable courseware as developed within the Training Material task and take-along Quick Reference materials as appropriate.

Up to 4 weeks of training will be provided to students per the Training Plan and Schedule developed collaboratively with the City and Starboard's teams.

2.14.1. Assumptions

- For classroom-based training, the City will provide the classrooms with PCs or laptops for hands-on learning and will ensure that no more than 10 participants are scheduled for each training session.
- The City will coordinate the scheduling of participants and classrooms based on the published training schedule.

2.15. Task – Deployment to Production

Starboard will migrate all tailored objects to the Production environment, using the Train/QA environment Maximo Migration packages, as part of deployment activities.

2.15.1. Deliverables

- Deployment Plan
- Deployment Checklist

2.15.2. Assumptions

City staff will be made available during and after regular business hours as needed

2.16. Task – Post Implementation Support

Once the production deployment is complete, Starboard will provide on-site technical and functional support for up to the first two weeks of use and remote support for an additional two consecutive weeks.

The support schedule and the users to be supported will be worked out in advance of the production deployments so that all support staff understand their user assignments and the hours of operation they will be responsible for providing primary support.

Starboard will correct all defects introduced by our development efforts within the development and test environments for fix testing by the user community.

Periodic fix releases will be scheduled to the production environment as agreed upon by the City IT staff, according to their change management policies. Issues with the out-of-the-box functionality during the four-week post implementation support period will be logged by Starboard with IBM as PMRs as those are IBM's responsibility to resolve. Change requests will be logged to the Business Requirements database and submitted to the City Change Control Board for review and approval.

2.16.1. Assumptions

- The City will provide the issues and change-tracking toolsets and will be primarily responsible for ensuring all issues and changes have been logged and that test results have been documented and scanned or stored in a document sharing system.
- Defects will be reviewed by Starboard daily and Starboard will advise when corrections are ready for re-testing so that the deployment can be planned. This assumes that Starboard will be granted access to the issue and change toolsets.
- Starboard will be responsible for curing all defects introduced by their development activities but will not be responsible for any defects in the out-of-the-box functionality as delivered by the vendor, IBM Tivoli, nor for any defects by the City Maximo team. If the defect is found to exist within the Maximo product then the City Maximo Administrator is responsible for opening a service request directly with IBM's Support Center.

2.17. Task – Project Closeout

At the end of the project, Starboard will prepare a close-out document, outlining the project goals and outcomes and achievement thereof, to document consensus on successful project completion. The deliverable from this session will be a review and update of the Business Case documents from the CDR and a Project Close-Out report.

2.17.1. Deliverables

- Future Recommendations Memo
- DVD of project documentation

3. Optional Services

3.1. Task – Legacy Data Review and Requirements Workshop

Starboard will conduct workshops with the City for identifying legacy data to be migrated to Maximo. For those data sets that were not previously defined and loaded to Maximo in the Pilot, Starboard will identify the detailed requirements for each data set.

Starboard will conduct a weeklong workshop with the City to identify additional legacy data sets to be migrated to Maximo. Starboard will develop a data migration plan, addressing data migration requirements for each data set and determination of any requirements for migration of historical and/or in-flight data.

3.1.1. Deliverables

- Data Migration Plan

3.1.2. Assumptions

Starboard assumes that asset and location records for distributed assets, such as those supporting the Distribution, Collection and Stormwater systems will be populated into Maximo via integration with ESRI GIS.

For data sets loaded to Maximo during the pilot, the same data collection spreadsheets will be used to support data migration for this phase as were utilized during the pilot.

Starboard assumes the following data sets to be within this scope of work for migration to Maximo:

- Assets
- Locations
- Meters
- Condition Monitoring Points
- Storerooms
- Item Master
- Inventory (balances and costs)
- Tools
- Vendors and Manufacturers
- Job Plans
- Preventative Maintenance Schedules
- Work and Asset Standards
- Historical Work Orders
- Classifications for Work and Assets
- Failure Hierarchy
- Labor and User records
- Security Groups
- Crafts
- Crews
- Calendar

Historical work order records will be migrated to Maximo. Given the wide variety of data available in work order systems today, we have developed a load object in our StarMax Solution to assist our customers with standardizing their work order data when loading to Maximo so that it can be analyzed as part of a total work backlog with the new work orders created once Maximo is live.

The data we will load into Maximo for work orders is included in the table below:

Data	Comments
Legacy Work Order Number	This is the unique identifier for the record in the legacy system. This number will be used for the Maximo work order with a prefix of "HIST-".
Location or Asset	This is either the location or asset code against which the history is being loaded. If an asset is chosen, the asset's current location will be used for the historical record. This must match a VALID location or asset code in Maximo.
Status	The two valid values are INPRG for existing active work orders or CLOSED for work orders already completed.
Date Opened	This is the date the work order was originally created.
Priority	This is the priority of the work, valid values are 1,2,3,4 or 5.
Date Closed	The date the work was completed, if CLOSED.
Work Type	The original type of work, valid values are CM or PM.
Short Description	The short description of the maintenance activity.
Work Log	Comments captured by the crews or technicians on the work.
Lead	The technician or crew lead who performed the work.
Failure	The failure for corrective work. This must match a failure code that exists in Maximo.
Problem	The problem found for corrective work. This must match a failure code that exists in Maximo.
Actual Labor Hours	The total hours charged to the work order.
Actual Labor Cost	The total cost of labor charged to the work.
Actual Material Cost	The total cost of material charged to the work order.
Total Cost	The total cost of the labor and materials charged to the work order.

No detailed historical transactions for the labor or material will be loaded into Maximo but the inclusion of the summarized costs allows Maximo to apply historical costs to the assets for lifecycle costing purposes if desired by the City.

3.2. Task – Data Migration and Loading

Starboard and the City will identify any Data necessary to support Phase 2 of the project. Starboard will provide data loading format and requirements which the City will adhere to in providing data from legacy applications and other sources for loading into the Maximo development environment utilizing the Maximo Integration Framework (MIF).

Starboard uses the MIF tool provided by IBM because it uses the Maximo Business Objects (MBOs) to populate data into the database tables which enforces the same level of quality as if

the user were typing it directly into the application screen. Any records not meeting the criteria for insert or update into the system are noted in error and audit tables, with the reason for failure, so that they can be re-processed in successive iterative loads.

Starboard will facilitate an In-Progress Review (IPR)sessions bi-weekly with the Core Team to review the data as it is loaded. This will allow the City to become comfortable with the delivered functionality of Maximo as the implementation progresses.

Starboard has converted millions of records from a wide variety of legacy applications in our years of implementing Maximo. A key success factor in that process is the involvement of client staff in the data process. As the owners and users of the data, client input is critical in compiling a complete and accurate set of records. The most common issues are generally around consolidating records and resolving data conflicts across multiple sources. With a partnership of Starboard and City staff, any issues encountered can be managed and mitigated.

3.2.1. Deliverables

The deliverables from this activity will be standardized data that can be migrated to successive environments for delivery and deployment activities.

3.2.2. Assumptions

Starboard will load the data provided by the City up to 2 times into the Maximo Development environment, once for review by City staff, and a second time to address any issues reported after the review. If the City requires additional loads due to data quality, that effort will be considered outside of this scope of work.

Project Timeline

A high-level project timeline is included on the following pages.

Current Workload

Starboard is a strong and growing firm; we are continuing to grow and add qualified resources to our team. Starboard's talent pool consists of multiple resources with diverse, yet complimentary, skill sets who may be assigned throughout a project as factors warrant different skills, experience and expertise. Starboard recognizes the significant undertaking of the City of Fort Lauderdale project and fully commits our resources to the project for the entire duration of the project. Throughout the duration of a client project, we minimize staffing changes and ensure that any changes required are effectively managed for a smooth transition.

ID	Task Name	Duration	Start	Finish
1	**City of Fort Lauderdale - Maximo Implementation Project**	**284 days**	**Tue 9/5/17**	**Fri 10/26/18**
2	**Phase 1 - StarMax Pilot**	**57 days**	**Tue 9/5/17**	**Wed 11/22/17**
3	**Project Management/Leadership/Oversight**	**50 days**	**Tue 9/5/17**	**Mon 11/13/17**
4	Travel Expenses - 5 trips at $1,500/trip	0 days	Tue 9/5/17	Tue 9/5/17
5	Project Management/Leadership/Oversight	50 days	Tue 9/5/17	Mon 11/13/17
6	*Deliverable: Communication Plan*	0 days	Tue 9/12/17	Tue 9/12/17
7	*Deliverable: Risk Management Plan*	0 days	Tue 9/12/17	Tue 9/12/17
8	*Deliverable: Team Roles and Responsibilities*	0 days	Tue 9/12/17	Tue 9/12/17
9	*Deliverable: Project Plan*	*0 days*	*Tue 9/12/17*	*Tue 9/12/17*
10	*Deliverable: Status Reports*	*0 days*	*Tue 9/12/17*	*Tue 9/12/17*
11	*Deliverable: Invoices and Burn Reports*	*0 days*	*Tue 9/12/17*	*Tue 9/12/17*
12	**Discover**	**24 days**	**Tue 9/5/17**	**Fri 10/6/17**
13	**Project Kickoff**	**6 days**	**Tue 9/5/17**	**Tue 9/12/17**
14	Prepare kickoff materials and coordination	5 days	Tue 9/5/17	Mon 9/11/17
15	Conduct Kickoff Meeting (Onsite)	1 day	Tue 9/12/17	Tue 9/12/17
16	*Deliverable: Agenda and Presentation documentation*	0 days	Tue 9/12/17	Tue 9/12/17
17	**Technical Architecture Review**	**20 days**	**Mon 9/11/17**	**Fri 10/6/17**
18	*Deliverable: Environment Questionnaire*	0 days	Mon 9/11/17	Mon 9/11/17
19	Ft. Lauderdale Completes Technical Questionnaire	5 days	Mon 9/11/17	Fri 9/15/17
20	Develop System Architecture Document	4 days	Mon 9/18/17	Thu 9/21/17
21	Conduct Review Session with Ft. Lauderdale IT Team	1 day	Tue 9/26/17	Tue 9/26/17
22	Updates based on Review Session	1 day	Wed 9/27/17	Wed 9/27/17
23	Approval Architecture Plan	7 days	Thu 9/28/17	Fri 10/6/17
24	*Deliverable: System Architecture Document*	0 days	Fri 10/6/17	Fri 10/6/17
25	**Define**	**35 days**	**Tue 9/12/17**	**Mon 10/30/17**
26	**Install Maximo Applications**	**25 days**	**Tue 9/26/17**	**Mon 10/30/17**
27	**Create Development Environment**	**25 days**	**Tue 9/26/17**	**Mon 10/30/17**
28	Ft. Lauderdale Procures/Readies Hardware	14 days	Tue 9/26/17	Fri 10/13/17
29	Install Environment & Document Environment Configurations	5 days	Tue 10/17/17	Mon 10/23/17
30	Install Foundational Solution	5 days	Tue 10/24/17	Mon 10/30/17
31	*Deliverable: Development Maximo Environment*	0 days	Mon 10/30/17	Mon 10/30/17
32	*Deliverable: Environment Configuration Document*	0 days	Mon 10/30/17	Mon 10/30/17

ID	Task Name	Duration	Start	Finish
33	*Deliverable: Installation Checklist*	0 days	Mon 10/30/17	Mon 10/30/17
34	**Legacy Data Review for Pilot**	**19 days**	**Tue 9/12/17**	**Fri 10/6/17**
35	Conduct Workshops	3 days	Tue 9/12/17	Thu 9/14/17
36	Develop Data Conversion and Migration Plan (Provide Spreadsheets if Necessary)	5 days	Mon 9/18/17	Fri 9/22/17
37	Conduct Data Conversion and Migration Plan Review/Walkthrough	1 day	Tue 9/26/17	Tue 9/26/17
38	Update Plan based on Feedback	4 days	Wed 9/27/17	Mon 10/2/17
39	*Deliverable: Data Conversion and Migration Plan*	0 days	Mon 10/2/17	Mon 10/2/17
40	Approval and Signoff of Data Conversion and Migration Plan	4 days	Tue 10/3/17	Fri 10/6/17
41	**Deliver**	**33 days**	**Mon 10/9/17**	**Wed 11/22/17**
42	**Data Migration and Loading**	**30 days**	**Mon 10/9/17**	**Fri 11/17/17**
43	Provide Six Interactive Online Learning Modules (IOLs)	0 days	Mon 10/9/17	Mon 10/9/17
44	Ft. Lauderdale Collects Data and Starboard Reviews	10 days	Mon 10/9/17	Fri 10/20/17
45	Initial Data Load and Unit Testing	20 days	Mon 10/23/17	Fri 11/17/17
46	Pilot is Available in Development Environment	0 days	Fri 11/17/17	Fri 11/17/17
47	Pilot Review with Core Team	3 days	Mon 11/20/17	Wed 11/22/17
48	*Deliverable: Pilot Approval and Signoff*	0 days	Wed 11/22/17	Wed 11/22/17
49	**Phase 2 - Full Implementation**	**227 days**	**Wed 11/22/17**	**Fri 10/26/18**
50	**Project Management/Leadership/Oversight**	**227 days**	**Wed 11/22/17**	**Fri 10/26/18**
51	Travel Expenses - 50 trips at $1,500/trip	0 days	Mon 11/27/17	Mon 11/27/17
52	Project Management/Leadership/Oversight	227 days	Mon 11/27/17	Fri 10/26/18
53	**Project Communications**	**227 days**	**Wed 11/22/17**	**Fri 10/26/18**
54	Bi-Weekly Starboard Internal Meeting	227 days	Mon 11/27/17	Fri 10/26/18
55	Bi-Weekly Status Meeting with Ft. Lauderdale	227 days	Mon 11/27/17	Fri 10/26/18
56	Monthly Updates to Sponsor and Business Leader	227 days	Mon 11/27/17	Fri 10/26/18
57	*Deliverable: Status Reports*	*0 days*	*Wed 11/22/17*	*Wed 11/22/17*
58	*Deliverable: Invoices and Burn Reports*	*0 days*	*Wed 11/22/17*	*Wed 11/22/17*
59	**Discover**	**29 days**	**Mon 11/27/17**	**Wed 1/17/18**
60	**Project Kickoff Phase 2**	**2 days**	**Mon 11/27/17**	**Tue 11/28/17**
61	Prepare kickoff materials and coordination	1 day	Mon 11/27/17	Mon 11/27/17
62	Conduct Kickoff (Onsite)	1 day	Tue 11/28/17	Tue 11/28/17
63	*Deliverable: Agenda and Presentation documentation*	0 days	Tue 11/28/17	Tue 11/28/17

ID	Task Name	Duration	Start	Finish
64	**Stakeholder Analysis**	**5 days**	**Tue 12/5/17**	**Fri 12/15/17**
65	Prep and coordinate Interview Sessions	1 day	Tue 12/5/17	Tue 12/5/17
66	Conduct Interview Sessions (Onsite)	3 days	Tue 12/5/17	Thu 12/7/17
67	Develop Deliverable	2 days	Mon 12/11/17	Fri 12/15/17
68	*Deliverable: Interview Meeting Minutes with identified risks, challenges and requirements*	0 days	Fri 12/15/17	Fri 12/15/17
69	**Review Business Processes**	**8 days**	**Mon 1/8/18**	**Wed 1/17/18**
70	Review Business Processes and Recommend Changes if Needed (Onsite)	3 days	Mon 1/8/18	Wed 1/10/18
71	Develop Business Process Recommendations	5 days	Thu 1/11/18	Wed 1/17/18
72	*Deliverable: Business Process Recommendations*	0 days	Wed 1/17/18	Wed 1/17/18
73	**Define**	**85 days**	**Tue 11/28/17**	**Mon 4/9/18**
74	**Install Maximo Applications**	**30 days**	**Tue 11/28/17**	**Fri 1/19/18**
75	**Create Test Environment**	**6 days**	**Tue 11/28/17**	**Tue 12/5/17**
76	Install Environment & Document Environment Configurations	5 days	Tue 11/28/17	Mon 12/4/17
77	Copy Dev Database to Test Environment	1 day	Tue 12/5/17	Tue 12/5/17
78	Deliverable: Test Maximo Environment	0 days	Mon 12/4/17	Mon 12/4/17
79	**Create Train/QA Environment**	**5 days**	**Mon 1/8/18**	**Fri 1/12/18**
80	Install Environment & Document Environment Configuration	5 days	Mon 1/8/18	Fri 1/12/18
81	Deliverable: Train/QA Maximo Environment	0 days	Fri 1/12/18	Fri 1/12/18
82	**Create Production Environment**	**5 days**	**Mon 1/15/18**	**Fri 1/19/18**
83	Install Environment & Document Environment Configurations	5 days	Mon 1/15/18	Fri 1/19/18
84	Deliverable: Production Maximo Environment	0 days	Fri 1/19/18	Fri 1/19/18
85	Deliverable: Environment Configuration Document	0 days	Fri 1/19/18	Fri 1/19/18
86	Deliverable: Installation Checklist	0 days	Fri 1/19/18	Fri 1/19/18
87	**Integration Design Workshops**	**44 days**	**Tue 1/16/18**	**Fri 3/16/18**
88	Conduct Requirements Session for ERP/Lawson Interface (Onsite)	3 days	Tue 1/16/18	Thu 1/18/18
89	Develop Interface Design Document	5 days	Mon 1/22/18	Fri 1/26/18
90	*Deliverable: Maximo/Lawson Interface Design Document*	0 days	Fri 1/26/18	Fri 1/26/18
91	Conduct Requirements Session for ESRI/GIS Interface (Onsite)	3 days	Tue 2/6/18	Thu 2/8/18

ID	Task Name	Duration	Start	Finish
92	Develop Integration Design Document	5 days	Mon 2/12/18	Fri 2/16/18
93	*Deliverable: GIS Interface Design Document*	0 days	Mon 2/19/18	Mon 2/19/18
94	Conduct Document Review/Walkthrough (Onsite)	2 days	Tue 2/27/18	Wed 2/28/18
95	Final Updates to Document	3 days	Mon 3/5/18	Wed 3/7/18
96	Approval of Interface Design	5 days	Mon 3/12/18	Fri 3/16/18
97	*Deliverable: Complete Design Document with Required Configurations*	0 days	Fri 3/16/18	Fri 3/16/18
98	*Ft. Lauderdale Approval to Proceed to Development*	0 days	Fri 3/16/18	Fri 3/16/18
99	**Test Planning Activities**	**15 days**	**Mon 3/19/18**	**Mon 4/9/18**
100	Develop Test Plan and Test Scenarios	14 days	Mon 3/19/18	Fri 4/6/18
101	Review and Walkthrough (Remote)	1 day	Mon 4/9/18	Mon 4/9/18
102	*Deliverable: Test Plan & Scenarios*	0 days	Mon 4/9/18	Mon 4/9/18
103	**Develop**	**102 days**	**Mon 3/19/18**	**Fri 8/10/18**
104	**Build**	**63 days**	**Mon 3/19/18**	**Fri 6/15/18**
105	**Integration Development**	**48 days**	**Mon 3/19/18**	**Thu 5/24/18**
106	**Integrated ERP/Lawson Application**	**48 days**	**Mon 3/19/18**	**Thu 5/24/18**
107	Build to Approved Interface Design	29 days	Mon 3/19/18	Fri 4/27/18
108	Conduct Unit/System Test with Subject Matter Experts	15 days	Mon 4/30/18	Fri 5/18/18
109	Document Configurations	4 days	Mon 5/21/18	Thu 5/24/18
110	**GIS - ESRI**	**48 days**	**Mon 3/19/18**	**Thu 5/24/18**
111	Build to Approved Interface Design	29 days	Mon 3/19/18	Fri 4/27/18
112	Conduct Unit/System Test with Client	15 days	Mon 4/30/18	Fri 5/18/18
113	Document Configurations	4 days	Mon 5/21/18	Thu 5/24/18
114	**Support Integration Testing**	**10 days**	**Mon 6/4/18**	**Fri 6/15/18**
115	Support Technical Team in Unit Testing Interfaces (Onsite)	10 days	Mon 6/4/18	Fri 6/15/18
116	**Test**	**54 days**	**Fri 5/25/18**	**Fri 8/10/18**
117	**Deploy to TEST**	**19 days**	**Fri 5/25/18**	**Thu 6/21/18**
118	Prepare to Deploy to TEST Environment	5 days	Fri 5/25/18	Fri 6/1/18
119	Deployment to TEST Environment	10 days	Mon 6/4/18	Fri 6/15/18
120	Regression Test Deployment	4 days	Mon 6/18/18	Thu 6/21/18
121	*Deliverable: Migration Checklist*	0 days	Thu 6/21/18	Thu 6/21/18
122	**User Acceptance Testing**	**12 days**	**Fri 6/22/18**	**Tue 7/10/18**
123	Week 1 UAT (Onsite)	2 days	Fri 6/22/18	Mon 6/25/18

ID	Task Name	Duration	Start	Finish
124	Week 2 UAT - Offsite Implement Fixes	3 days	Tue 6/26/18	Thu 6/28/18
125	Week 3 UAT (Onsite)	2 days	Fri 6/29/18	Mon 7/2/18
126	Week 4 UAT - Final Fix Week	3 days	Tue 7/3/18	Fri 7/6/18
127	Week 5 UAT - Final UAT (Onsite)	2 days	Mon 7/9/18	Tue 7/10/18
128	Go/No-Go Decision	0 days	Tue 7/10/18	Tue 7/10/18
129	*Deliverable: Issues Log*	0 days	Tue 7/10/18	Tue 7/10/18
130	*Deliverable: Testing Results*	0 days	Tue 7/10/18	Tue 7/10/18
131	*Deliverable: Enhancements Log*	0 days	Tue 7/10/18	Tue 7/10/18
132	**Deployment to TRAIN/QA Environment**	**20 days**	**Mon 7/16/18**	**Fri 8/10/18**
133	Prepare to Deploy to TRAIN Environment	5 days	Mon 7/16/18	Fri 7/20/18
134	Execute Deployment to TRAIN Environment	10 days	Mon 7/23/18	Fri 8/3/18
135	Regression Test Deployment	4 days	Tue 8/7/18	Fri 8/10/18
136	*Deliverable: Deployment Checklist*	0 days	Fri 8/10/18	Fri 8/10/18
137	*Deliverable: Application Configuration Document*	0 days	Fri 8/10/18	Fri 8/10/18
138	**Deliver**	**142 days**	**Mon 4/9/18**	**Fri 10/26/18**
139	**Training Plan**	**15 days**	**Mon 4/9/18**	**Fri 4/27/18**
140	Develop Training Plan	5 days	Mon 4/9/18	Fri 4/13/18
141	Training Plan walkthrough and Review	1 day	Mon 4/16/18	Mon 4/16/18
142	Training Plan updates based on Feedback	3 days	Tue 4/17/18	Thu 4/19/18
143	Final Review and Approval of Plan	5 days	Mon 4/23/18	Fri 4/27/18
144	*Deliverable: Training Plan and Calendar*	0 days	Fri 4/27/18	Fri 4/27/18
145	*Deliverable: Training Syllabus*	0 days	Fri 4/27/18	Fri 4/27/18
146	**Develop Training Material**	**38 days**	**Mon 4/30/18**	**Thu 6/21/18**
147	Develop Training Materials for End-User Training	19 days	Mon 4/30/18	Thu 5/24/18
148	Material feedback and reviews	10 days	Fri 5/25/18	Fri 6/8/18
149	Material Updates	5 days	Mon 6/11/18	Fri 6/15/18
150	Final Review and Approval of Materials	4 days	Mon 6/18/18	Thu 6/21/18
151	*Deliverable: Training Materials*	0 days	Thu 6/21/18	Thu 6/21/18
152	**Maximo Administration Training**	**9 days**	**Mon 7/23/18**	**Thu 8/2/18**
153	Prepare for training	3 days	Mon 7/23/18	Wed 7/25/18
154	Conduct Training (Onsite)	4 days	Mon 7/30/18	Thu 8/2/18
155	*Deliverable: Admin Training Material and Agenda*	0 days	Thu 8/2/18	Thu 8/2/18
156	**Deliver End User Training**	**92 days**	**Mon 4/30/18**	**Fri 9/7/18**

ID	Task Name	Duration	Start	Finish
157	Users Complete IOLs	29 days	Mon 4/30/18	Fri 6/8/18
158	End User Training Using Role Based Training Materials (Onsite)	19 days	Mon 8/13/18	Fri 9/7/18
159	**Deployment to Production**	**15 days**	**Mon 9/10/18**	**Fri 9/28/18**
160	Production Plan Preparation	4 days	Mon 9/10/18	Thu 9/13/18
161	*Deliverable: Deployment Plan*	0 days	Thu 9/13/18	Thu 9/13/18
162	*Deliverable: Deployment Checklist*	0 days	Thu 9/13/18	Thu 9/13/18
163	Deployment to PROD Environment	10 days	Mon 9/17/18	Fri 9/28/18
164	GO-LIVE	0 days	Mon 10/1/18	Mon 10/1/18
165	**Post-Implementation Support**	**20 days**	**Mon 10/1/18**	**Fri 10/26/18**
166	On-Site Support	10 days	Mon 10/1/18	Fri 10/12/18
167	Remote Support	10 days	Mon 10/15/18	Fri 10/26/18
168	**Project Close-Out**	**20 days**	**Mon 10/1/18**	**Fri 10/26/18**
169	Prepare Project Close-Out Material	19 days	Mon 10/1/18	Thu 10/25/18
170	Conduct Project Close-Out Meeting (On-Site)	1 day	Fri 10/26/18	Fri 10/26/18
171				
172	**City of Fort Lauderdale - Maximo Implementation Project (Optional Acti**	**49 days**	**Mon 5/2/16**	**Thu 7/7/16**
173	**Legacy Data Review and Requirements Workshop**	**34 days**	**Mon 5/2/16**	**Thu 6/16/16**
174	Conduct Data and Requirements Workshops	3 days	Mon 5/2/16	Wed 5/4/16
175	Develop Data Conversion and Migration Plan	15 days	Fri 5/6/16	Thu 5/26/16
176	Conduct Data Conversion and Migration Plan Review/Walkthrough (Onsite)	1 day	Mon 5/30/16	Mon 5/30/16
177	Update Plan based on Feedback	1 day	Tue 5/31/16	Tue 5/31/16
178	Provide Spreadsheets (if needed)	3 days	Mon 6/6/16	Wed 6/8/16
179	*Deliverable: Data Conversion and Migration Plan*	0 days	Wed 6/8/16	Wed 6/8/16
180	Approval and Signoff of Data Conversion and Migration Plan	5 days	Fri 6/10/16	Thu 6/16/16
181	**Data Migration and Loading**	**49 days**	**Mon 5/2/16**	**Thu 7/7/16**
182	Ft. Lauderdale Collects Data and Starboard Reviews	20 days	Mon 5/2/16	Fri 5/27/16
183	Initial Data Load & Unit Testing	20 days	Fri 5/27/16	Thu 6/23/16
184	Preform Inprogress Data Review Session (Onsite)	1 day	Fri 6/24/16	Fri 6/24/16
185	Update Data as Necessary Based on Reviews	10 days	Fri 6/24/16	Thu 7/7/16

4. References

Selected References

Three Starboard references are provided on the attached pages for your review.

Starboard Consulting will assist in the coordination of contacting our reference accounts once the timing of those contacts is defined. We respect our customers' time and understand that, due to shifting priorities in this very competitive industry, unplanned contact is not always a convenient request. We will work jointly with the City and our clients to plan the most beneficial meetings that meet the needs of all organizations involved. We sincerely appreciate your understanding of our position on this and want to ensure you of our cooperation once the timing for the reference contacts has been established.

CLIENT: Knoxville Utilities Board

Project Manager / Key Team Members

- **Alex Daisley**
- **Melissa Ekmark**
- **Lani Trotter**
- **Peggy Baker**
- **Gustavo de los Rios**
- **Allison Fullerton**
- **Jim Smith**
- **Sam Neel**
- **Darrell King**
- **Shirley Harlan**
- **Bryan Grant**

Project Information

Location	Knoxville, TN
Industry	Municipal Utility (Electric, Gas, Water, Wastewater)
Client Background	Knoxville Utilities Board was created by an amendment to the Knoxville City Charter in 1939. As an independent agency of the City of Knoxville, KUB provides electric, gas, water, and wastewater services to more than 439,000 customers in Knoxville and parts of seven surrounding counties.
Project Duration	**Project start:** 2011 **Project completion:** 2014 (multiple phases) **Current Effort:** Providing on-going maintenance and support
Project Title	Maximo 7.5 Implementation
Project Budget	$2,275,680
Contact	**Name: Craig Livingston** **Email:** Craig.Livingston@kub.org **Phone: (865) 558-2593**

Solution/Services Provided

Maximo implementation for version 7.5 with mobile work management using the Maximo Everyplace embedded within the OMS/MDS mobile solution for full work and asset management during storm events. The mobile solution allows users to perform a full suite of functions directly from the field including completing work orders, performing network traces, editing attributes for Maximo and GIS features via direct update and redlines, locating addresses, viewing linked and as-built documents, capturing inspections, entering meter readings, creating new and follow-up work orders, creating child work orders for restoration services, creating Operator Log records, and capturing Round measurements, and other necessary functions.

The implementation includes interfaces to SCADA, GIS, OMS/MDS, and PTO and Training primarily via service bus connections except for GIS which was a point to point. The Knoxville Utilities Board desired to integrate their Maximo and GIS platforms into a single asset management platform supporting their asset management and reliability centered maintenance initiatives. Starboard Consulting worked with KUB to integrate over two million records between the two systems for the water, wastewater, gas, and electric divisions and developed both a desktop and mobile mapping solution involving custom toolsets for tracing, linked documents, advanced address searching, and redlining with attribution editing. The solution was built upon the Maximo Spatial API jointly developed by IBM and ESRI and included geodatabase design and data collection activities.

The tailored Maximo functions included One Call request and response, valve operations, Operator Log, Rounds data collection in the field with review from the desktop, property accounting, project and job costing, contractor uploads for inspection results and follow-up work needs.

Data for the project was sourced from a data collection and audit activity performed by KUB for both the vertical and horizontal assets to confirm the data in both the Maximo and GIS enterprise systems. The products implemented include Maximo Scheduler, Maximo for Utilities, Maximo Spatial, Maximo Linear, and Maximo Everyplace.

The Maximo implementation was part of a broader asset management program initiative and thus best practices in both the program and the toolsets supporting the program were implemented simultaneously. Work and asset management standards, RCM and AM reports and analytics, condition based maintenance, and new asset management framework roles and responsibilities were implemented.

CLIENT: Orange County Facilities Management

Project Manager / Key Team Members

- **Aaron Germundsen**
- **John Brietz**
- **Colin Murphy**
- **Sam Rivera**
- **Peggy Baker**

Project Information

Location	Orange County Utilities/Orlando, FL
Industry	Municipal Government
Client Background	Orange County Utilities provides Water, Wastewater and Solid Waste Services to unincorporated Orange County, FL and some neighboring cities. Maximo is utilized as the Enterprise Wide Work and Asset Management System throughout the Utility. Orange County Utilities relies on Maximo's Work and Asset Management capabilities, has integrated Maximo with County and Utility systems such as GIS, FIS (Financials), CIS (Customer Information System), LIMS (Laboratory Information Management System) and has implemented Mobile for many of its field crews.
Project Duration	**Project start:** November 2016 **Project completion:** January 2018 (scheduled) **Current:** Providing on-going support
Project Title	Maximo 7.5 Enhancements
Project Budget	$943,853
Contact	**Name: Jorge Collado** **Email: Jorge.Collado@ocfl.net** **Phone: (407) 254-9902**

Solution/Services Provided

Starboard is currently working with Orange County Utilities on a project to implement enhancements to their current Maximo 7.5 System. These enhancements include such items as

- Implementation of Fats, Oil and Grease monitoring program in Maximo
- Implementation of Customer Call Tracking and integration with CIS (Customer Information System)
- Implementation of Tool Room check out/check in process
- Implementation of Maximo Scheduler
- Improvements to Inventory Backorder processing
- Enhanced use of Purchase Contracts in Maximo
- Work Order Lifecycle improvements
- Mobile Maximo enhanced validations

CLIENT: Reedy Creek Improvement District

Project Manager / Key Team Members

- **Amy Tatum**
- **Melissa Christensen**
- **Peggy Baker**
- **Gustavo De Los Rios**
- **Allison Fullerton**

Project Information

Location	Osceola County, FL
Industry	Entertainment/Resort
Client Background	Reedy Creek Improvement District is a public corporation of the State of Florida and is located in central Florida, about 15 miles southwest of the City of Orlando. The District currently encompasses approximately 25,000 acres or 38.6 square miles. Approximately 18,800 acres of the District's property are located in Orange County and 6,200 acres are located in Osceola County. Two cities are located within the boundaries of the District, the city of Lake Buena Vista and the city of Bay Lake. The District, in accord with its enabling legislation, is responsible to the owners of land within the District and the public to provide for surface water control and drainage, utilities and mosquito control; roads and bridges; land use regulation and planning; fire protection; emergency medical services; environmental services; data collection and evaluation; building and other construction codes enforcement and inspections; and interface with local, regional, state and federal regulatory agencies.
Project Duration	**Project start:** March 2010 **Project completion:** July 2011
Project Title	Upgrade of Maximo 4.1.1 to MXES
Project Budget	$258,000
Contact	**Name:** Carolyn Holden, CMMS Administrator **Email:** Carolyn.holden@disney.com **Phone:** (407) 824-7918

Solution/Services Provided

Starboard provided full implementation services to upgrade Maximo from version 4.1.1 to 7.1 with an integration to Great Plains for purchasing. Project tasks include reviewing client business processes in 4.1.1 and recommending process improvements taking advantage of new features available in v7, data migration and cleanup, and end-user and system administrator training. The Starboard team was responsible for all application configuration, business object extensions, report development, building interfaces using the Integration Framework, and migrating changes from a development to test and production instances using the Migration Manager.

This resort client maintains assets across several utilities, including electric generation and distribution, steam, chilled and potable water, natural gas, storm water, wastewater collection and treatment and solid waste. They utilize Maximo for service request and work order management, asset management and inventory.

5. Minority/Women (M/WBE) Participation

Starboard Consulting is a certified minority business enterprise as defined by the Florida Small and Minority Business Assistance Act of 1985. Starboard's certification of such is provided on the following page.

Karen Buck

From: OSDAssist@dms.myflorida.com
Sent: Monday, January 11, 2016 3:47 PM
To: Karen Buck
Subject: Online Registration: Minority Certification Validated
Attachments: OSD_MBE_Certificate.pdf

FLORIDA DEPARTMENT of management SERVICES
We serve those who serve Florida

January 11, 2016

Dear Karen Buck,

Your application for Statewide and Inter-Local Certified Business Enterprise (CBE) certification is hereby approved and effective for a period of two years. The certification of the business, which is designated as WOMAN OWNED is applicable when business is conducted consistent with this specialty(s).

- 43232701 - Application server software
- 80101507 - Information technology consultation services
- 81111805 - Proprietary or licensed systems maintenance or support
- 81112200 - Software maintenance and support
- 84121706 - Financial asset management service
- 86101601 - Computer vocational training services

Your submittal of bids to supply other products or services outside of this specialty(s) will result in the contracting entity not getting credit for CBE participation in that business transaction.

You are encouraged to become an active bidder in the participating programs of the Statewide and Interlocal Agreement. You must also be aware that some of the participating entities have certification eligibility criteria unique to those of the reciprocal certification network because they have been imposed by their disparity studies. As a result, some program offices may ask you to submit additional documentation before you are eligible to bid as a certified CBE with that jurisdiction or organization.

The Laws of Florida require that the Office of Supplier Diversity be advised of any and all changes in the company's status occurring within fourteen (14) days of the transfer or change taking place. This law is applicable throughout the effective certification dates.

Questions concerning your CBE certification may be directed to this office at (850) 487-0915.

Sincerely,

Office of Supplier Diversity
4050 Esplanade Way

Tallahassee, FL 32399-0950

If you have any questions or concerns about eProcurement, please call MyFloridaMarketPlace customer service at 1-866-352-3776.

State of Florida

Minority, Women & Florida Veteran Business Certification

Starboard Consulting, LLC

Is certified under the provisions of
287 and 295.187, Florida Statutes, for a period from:

01/11/2016 to 01/11/2018

Chad Poppell, Secretary
Florida Department of Management Services

Office of Supplier Diversity • 4050 Esplanade Way, Suite 380 • Tallahassee, FL 32399 • 850-487-0915 • www.osd.dms.state.fl.us

6. Sub-Consultants

Use of Sub-consultants and Off-Shore Resources

Starboard understands that our people are our strength and is proposing only full-time U.S. based consultants to work on the City of Fort Lauderdale project. Starboard does not plan on using any subcontractors and/or off-shore resources on this project.

FORM 3 - FUNCTIONAL REQUIREMENTS

INSTRUCTIONS FOR COMPLETING FUNCTIONAL REQUIREMENTS

1) **Proposer Response**

For each numbered line item requirement, the Proposer must indicate Y, 3P, C, F, or N with an "**X**" in the Vendor Response column, according to the following legend:

Y	Fully supported by the current release of the software.
3P	Supported with third party software (i.e. software not directly owned or controlled by the Proposer submitting the proposal).
C	Customization is required to meet the requirement (e.g. changes to the underlying code must be made; a new table must be created; etc.) This causes additional upgrade work in order to implement new versions or upgrades.
F	Future functionality: Supported in the next release of the software.
N	Not supported.

2) If the Proposer responds with 3P, C, or F, the Proposer **must** provide additional information in the comments column:

- For **"3P"**, the Proposer must explain what third party software application or service is required, any integration requirements, and the Proposer's relationship with this third party.
- For **"C"**, the Proposer must explain the nature and amount of customization required, and experience with the same or similar modifications.
- For **"F"**, the Proposer must explain the functionality in the new release, the expected general availability release timing and provide surety that the functionality will be included.

3) The Proposer must also identify which module(s) the required functionality is part of in the final column (as applicable).

The information must be completed and submitted in the format provided. We must be fully provided with all associated software, modules, equipment, and technology platforms, and any other information that is required to obtain a fully functioning system. It is must be clearly delineated what is in the software package as standard and what is optional. Any module shown and construed to be a part of the basic package that is not delineated will be considered standard.

		Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore	Proposer Response Y 3P C F N					Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. **Proposer Response Legend:** Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported	Applicable Module(s)
		Summary of Module/Functionality Footprint Requirements							
1	R	Asset Record Tracking	Y						Maximo Asset Management
2	R	Asset Lifecycle Management	Y						Maximo Asset Management
3	R	Parts/Supplies Inventory	Y						Maximo Asset Management
4	R	Preventive Maintenance (PM) Planning & Scheduling	Y						Maximo Asset Management
5	R	Work Management	Y						Maximo Asset Management
6	R	Customer Service Requests	Y						Maximo Asset Management
7	R	Billing	Y						Maximo for Service Provider (optional add on solution)
8	R	Reporting	Y						Maximo Asset Management
9	R	Risk Analysis	Y						Maximo Asset Management
10	R	Capacity, Management, Operations, and Maintenance CMOM Planning & Reporting	Y						Maximo Asset Management
		General Features							

		Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore	**Proposer Response** **Y N** **3P** **C** **F**					**Comments** *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. **Proposer Response Legend:** Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported	**Applicable Module(s)**
11	R	User defined and searchable fields, and user customizable menus and screens/forms to facilitate a more focused user interface for each group of end users.	Y						Maximo Asset Management
12	R	Intuitive system navigation with “click” drill down. Minimize the # of screens and clicks needed to get to the required activity or record.	Y						Maximo Asset Management
13	R	Ability to access in the field on a variety a devices, including laptops, tablets and smartphones. Mobile version of the software must be a lightweight, user friendly version of the application.	Y						Maximo Asset Management
14	I	Drill down to transaction detail throughout all modules and across to other modules.	Y						Maximo Asset Management
15	R	Multi directional electronic approval routing.	Y						Maximo Asset Management
16	I	Customer definable rules-based workflow rules for sequential, broadcast, and event-based approval routing and record distribution with flags, alerts, triggers and actions based on defined events and thresholds.	Y						Maximo Asset Management
17	I	System must support interface, content, and workflow customizations by a trained system administrator without programming.	Y						Maximo Asset Management

		Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore	Proposer Response Y N	3P	C	F	Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. **Proposer Response Legend:** Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported	Applicable Module(s)
18	I	Unlimited notes or text fields.	Y					Maximo Asset Management
19	R	Full audit trail and history throughout all modules: Date, time, who made the change, retain what was changed, and show new record.	Y				Note that Maximo allows any field to be designated as auditable. However, best practices are to only make specific fields, with a business purpose auditable.	
20	R	Customer definable and changeable forms, letters and notifications with context sensitive access. (E.g. condition assessment, homeowner notifications, etc.)	Y					Maximo Asset Management
21	I	Role-based, user configurable menus, screens, fields, and reports.	Y					Maximo Asset Management
22	I	Context sensitive help.	Y					Maximo Asset Management
23	I	Global updates; ability to pick a field where update should be made and have that field update across all like records.	Y				The user can update the information in a field, and where ever that information is referenced, the new data will be displayed. In some cases, revision control and other business rules may not allow the display of new data.	Maximo Asset Management
24	I	Real-time system update and data availability.	Y					Maximo Asset Management
25	N	Ability to have the history from QAlert available.	Y				Via the Maximo Integration Framework	Maximo Asset Management
26	I	Work on multiple open screens at one time from a single sign-on.	Y					Maximo Asset Management
27	I	Ability to have split-screen. E.g. One side of screen has map, other side has new Work Order form.	Y					Maximo Asset Management

		Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore	Proposer Response Y N 3P C F					Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. **Proposer Response Legend:** Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported	Applicable Module(s)
28	I	System must have a dashboard style page configurable by each user for viewing assigned or monitored work activities. Should include: cost summaries, to do lists, charts, graphs, maps, reports, etc. should be configurable based on any number of search parameters defined by the user.	Y						Maximo Asset Management
29	R	System must be able to develop maintenance schedule from inventory criteria	Y						Maximo Asset Management
		Technology							
30	I	Preferably database should be Microsoft SQL Server or Oracle database. If not what RDBMS and versions are used?	Y					MS-SQL, Oracle and DB2	Maximo Asset Management
31		Identify server/platform. Discuss options.	Y					The most current Maximo system requirements are published by IBM at	Maximo Asset Management
32		Indicate platforms supported and % of installs for each	Y						Maximo Asset Management
33		▪ Indicate databases supported and % of installs for each	Y					Oracle (apprx 50%); MS SQL (apprx 30%); DB2 (apprx 20%)	Maximo Asset Management
34		▪ Indicate source code language	Y					Maximo is J2EE architected.	Maximo Asset Management

		Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore	Proposer Response Y N 3P C F					Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. **Proposer Response Legend:** Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported	Applicable Module(s)
35	E	▪ Hosted/ASP solution. Briefly discuss if this is an option or future option and, if so, describe.	Y					Starboard's Foundation Solution is offered as Maximo as a Service (MaaS). Maximo as a Service is a hassle-free online solution: No Hardware, No Software,No Hassle	Maximo Asset Management
36	I	Web-based architecture with published open Application Program Interfaces (API's.) Briefly describe if you are fully Web-based, and what you have for APIs. Are your APIs configurable by customers to use for new or changed integration or do they require your professional services to change?	Y					Maximo Asset Management was web architected from the beginning to be a long-term solution for work and asset management. The Maximo Integration Framework follows the Service Oriented Architecture (SOA) directive and implements Web Services. It is completely customizable and the behavior can be changed with rules instead of programming. There are also facilities to transform XML with XSL and Java customization.	Maximo Asset Management
37	I	Supports Microsoft Active Directory. Single sign-on integration with Active Directory.	Y						Maximo Asset Management
38	I	Supports virtual server environment utilizing VMWare	Y						Maximo Asset Management
39	I	Row lock security.	Y						Maximo Asset Management
40	I	Fully supports/compliant with Service Oriented Architecture (SOA). Please explain/discuss.	Y					Maximo was built on J2EE-based Service-Oriented Architecture. See line 36.	Maximo Asset Management
41	R	Attach electronic files (e.g. JPEG, PDF, Word, wav, MP3, WMV, TIF, etc.) to	Y						Maximo Asset Management

		Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore	Proposer Response Y N	3P	C	F	Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. **Proposer Response Legend:** Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported	Applicable Module(s)
		various records and fields such as for a specific asset. List all file types supported.						
42	I	Attach AutoCAD DWG files to various records, fields and assets. Please explain/describe if you have the ability to open and read the DWG files from your proposed software.	Y				Provided that the brower plug-in is loaded for the device, Maximo can open an display any file type.	Maximo Asset Management
43	R	Email distribution of reports, approval requests, etc. from within the system.	Y					Maximo Asset Management
44	I	Bi-directional integration with Microsoft Office (especially Excel and Word)	Y				Records can be downloaded and uploaded via the Integration Framework to MS Excel. In addition, reports/printing can be sent to Microsoft or other formats.	Maximo Asset Management
45	R	Remote access. Support for Mobile Technologies IOS and Android	Y					Maximo Asset Management
46	I	Mobile technology interfaces should be customizable to the user role and provide a simple and direct platform so in-field crews have a minimal number of work steps to complete updates and check-ins.	Y					Maximo Asset Management
47	I	Describe any integration with CCTV to track video information real time to specific asset locations.	Y				Integration to CCTV is via the Maximo Integration Framework or via onscreen launch button for real time viewing.	Maximo Asset Management
48	I	Describe your touch screen capability for field data entry and mobile technology compatibility.	Y					
49	I	.NET architecture. Briefly describe if you are fully .NET or only in certain modules.				N	Maximo is J2EE Architected. No components use .NET	Maximo Asset Management

		Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore	Proposer Response Y N	3P	C	F	Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. **Proposer Response Legend:** Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported	Applicable Module(s)
		If not .NET what programming functionality is used (e.g. Java)?						
50	R	Workflow capability built on Windows Workflow Foundation (WF45) -Describe application and user security features/capabilities. Indicate any special security features (e.g. user security, function security, file security, field level security, etc.) provided by the software.	Y				Workflow is an integrated part of the Maximo Asset Management and includes the following capabilities: • Workflow processes and their supporting records are at the system level in a multisite implementation, and therefore can be used for all organizations and sites. Processes/sub-processes can be designed to be organization specific or site specific through the use of logical branching. • A Workflow process can be created for any business object (MBO). Because all the applications are associated with MBOs, you can build Workflow processes for any application, including duplicated and custom applications. • A record can be routed into a Workflow process automatically or manually. • When a process task requires a user decision, the record can be assigned to a role. At run time, the role resolves to a person group, person, or delegate (alternate). • Assignees can receive notifications of assignments in their Workflow Inbox, or in their organization's e-mail inbox, eliminating the need for users to search for their assignments. • Users may specify a delegate when unavailable. • Workers or administrators can reassign Workflow tasks (based on user security).	Maximo Asset Management

		Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore	Proposer Response Y N	3P	C	F	Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. **Proposer Response Legend:** Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported	Applicable Module(s)
							• Assignees can link from their Workflow Inbox directly to the assigned record. • When a process requires user input, the system can display a dialog box with a menu of context appropriate options specified in the process. • When a process requires user interaction, the system can direct a user to a specific application, tab, or action. • If there is only a single choice of actions, the system can move a record through a step in a process. • Time limits can be defined for completing a task, after which the system can escalate the record to another user or group. • During Workflow design, the designer can specify at what point in a process e-mail notifications are generated. • Workers or administrators can stop a process instance and remove a record from the control of Workflow (based on security). • A Workflow process can run a program (batch file or .exe) stored on a local server in the system directory. • A Workflow can run a custom Java class. • A Workflow process for one type of record can launch a process for another type of record. For example, a Service Request can launch a process for a Work Order.	

		Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore	Proposer Response Y N 3P C F	Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. **Proposer Response Legend:** Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported	Applicable Module(s)
				• A Workflow process can contain sub-processes, for example, for different subcategories of records, or records from different Sites.	
51	I	Compatibility with GPS/AVL technology in field vehicles.	Y		Maximo Asset Management
	R	Data Conversion / Retention			
52	R	Ability to convert data from other EAM/CMMS systems (Cayenta, QScend QAlert, Hansen). Please list what systems you have converted data from.	Y	Infor, Hansen, Oracle, Asset Suite, and others.	Maximo Asset Management
53		Please describe your Data Retention capabilities. Can records, attachments be flagged with different retention schedules?	Y	Maximo is designed to keep records on-line without having to archive any data (based on storage and hardware capacity). In some cases, after 5-10 years of use, customers can choose to start to archive data. IBM Optim can be used to archive data, as required, when required.	IBM Optim (optional)
	R	Training			
54	R	Ability to provide in-person training on all modules selected.	Y		
55	R	Ability to provide in-person system administration training.	Y		
	R	Interfaces / Integration			
56	I	Experience integrating with external applications such as Cayenta Yes/No Kronos Yes/No	Y	The Maximo Integration Framework supports bi-directional interfaces between Maximo and external systems for either real-time synchronization or batch	

		Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore	Proposer Response Y N	3P	C	F		Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. **Proposer Response Legend:** Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported	Applicable Module(s)
		Laserfiche Yes/No BuySpeed Yes/No Lawson Financial Yes/No						loading of data. It can process XML documents, flat files or interface tables. The MIF can send or receive data synchronously using Web Services or asynchronously using queues and will allow for batch load data from XML or flat files. The Integration Framework allows the synchronization and integration of data between an external system and applications that use these Base Services. There are 57 integration objects (object structures) provided with the product that can be used by configuring the Integration Framework. The Integration Framework follows the Service Oriented Architecture (SOA) directive and implements Web Services. It is completely customizable and the behavior can be changed with rules instead of programming. There are also facilities to transform XML with XSL and Java customization. Starboard has experience in integrating to ERP systems such as Cayenta and Lawson Financial; Timekeeping systems such a Kronos; P2P systems such as BuySpeed; and Enterprise Content Management systems such as Laserfiche	
57	E	Utility Billing: Software is Cayenta What experience do you have with integrating or interfacing with it?	Y					See line 56	
58	R	Water and Sewer Hydraulic Modeling: Software interfacing with Innovyze, InfoWater Suite and InfoSWMM,	Y					Maximo can integrate to graphical design and modeling tools via the Maximo Integration Framework	

		Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore	Proposer Response Y N 3P C F					Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. **Proposer Response Legend:** Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported	Applicable Module(s)
		respectively (ArcGIS10.1 or higher compatible)							
59	I	Do you have a client portal, or the ability and experience to integrate with one? Move to customer relations area	Y					Maximo can interface with customer portal tools.	
	R	GIS Integration							
60	R	The system shall utilize the City's enterprise geodatabase as the asset inventory.	Y						Maximo Spatial (Included)
61	R	The system must use non-redundant asset data storage with no reliance views, data mapping or synchronization.	Y					Maximo can utilize Arc GIS federated data.	Maximo Spatial (Included)
62	R	System must support Esri ArcGIS Sever 10.4 or current version and maintain compatibility with the most current version of ESRI GIS software within 6-months of an ESRI version release.	Y						Maximo Spatial (Included)
63	I	The system shall utilize inherent Esri spatial functions such as system trace, valve isolation, etc.	Y						Maximo Spatial (Included)
64	I	System should be designed to work primarily with GIS data, where geographic features (e.g. pipes) represent assets. It must integrate with the City's existing enterprise geodatabase, ArcGIS Server software and ArcGIS Online. The software should not require converting to a different format.	Y						Maximo Spatial (Included)

		Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore	Proposer Response Y N	3P	C	F	Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. **Proposer Response Legend:** Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported	Applicable Module(s)
65	R	System MUST be non-modular for asset types and functional groups. Core system must be configurable for unlimited asset types and asset groups without additional modules or licensing cost.	Y					Maximo Spatial (Included)
66	R	System should utilize the Esri geodatabase as the only asset database/repository and link to it out-of-the-box without additional add-ons or software licensing. All asset geometry and attributes must reside in the geodatabase and should not require middleware, modules, or synchronization with the work management database.	Y					Maximo Spatial (Included)
67	R	System should not set limits on the number of assets or the size or complexity of the asset data, other than those imposed by the underlying Esri software	Y					Maximo Spatial (Included)
68	R	System should support and detect relationship classes within the GIS	Y					Maximo Spatial (Included)
69	R	The system should have the ability to query and filter the Esri geodatabase from within the EAMS* software	Y					Maximo Spatial (Included)
70	R	System should provide a map interface, allowing the user to view assets, search, pan, zoom, locate, measure distances and include the capability to view information about assets' attributes from the GIS.	Y					Maximo Spatial (Included)
71	R	Map should be comprised of ArcGIS Server Map Services hosted on the City's	Y					Maximo Spatial (Included)

		Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore	**Proposer Response** **Y N**	**3P**	**C**	**F**		**Comments** *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. **Proposer Response Legend:** Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported	**Applicable Module(s)**
		ArcGIS Server or Esri ArcGIS Online Services, or a combination of both.							
72	R	Must support multiple map services, specific to users or groups of users, to meet the various GIS needs of each work business unit.	Y						Maximo Asset Management
73	R	Ability to locate address utilizing ArcGIS locating services (geocoding service).	Y						Maximo Spatial (Included)
74	R	Ability to select assets in the GIS map and create work orders and inspections associated to the selected assets.	Y						Maximo Spatial (Included)
75	R	Ability to attach multiple assets to a work order.	Y						Maximo Spatial (Included)
76	I	All work activities, (requests, work orders, inspections, etc.) should be displayed live on the map interface based on user preferences. User should be able to open activities from the map.	Y						Maximo Spatial (Included)
77	R	Ability to update asset attributes from within the EAMS software. All updates should utilize Esri technology so as to maintain the integrity of the GIS system.	Y						Maximo Spatial (Included)
78	R	Ability to easily publish work activities within the AMS software to REST endpoints for consumption on ArcGIS Server or ArcGIS Online.	Y						Maximo Spatial (Included)
79	R	Ability to use all geographic area map services available to perform geospatial	Y						Maximo Spatial (Included)

		Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore	Proposer Response Y N 3P C F	Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. **Proposer Response Legend:** Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported	Applicable Module(s)
		queries such as "select and map display all assets in a specific neighborhood."			
80	R	Ability to use all geographic area map services available to perform geospatial queries such as "select and map display all assets in a user defined area."	Y		Maximo Spatial (Included)
81	I	Display on a map the location and status of selected work order(s); examples of selection sets: all work orders for today, since a certain date, of a certain type or types, etc.	Y		Maximo Spatial (Included)
82	R	Create and close a work order from a selected map feature(s) and a service request from a location(s).	Y		Maximo Spatial (Included)
83	R	Display user-configurable map views; i.e., the ability to have different map layers visible based on preference, display scale, and/or work role.	Y		Maximo Spatial (Included)
84	R	Map viewer should provide tools to users for performing basic geographic-related tasks: for example, calculating measurements for length, and area, and determining relationships between assets, work orders, service requests to other GIS features like address points using buffer, intersection, and tracing tools.	Y		Maximo Spatial (Included)
85	I	Print and/or export (for example, PDF format) a map with a legend, bar scale,	Y		Maximo Spatial (Included)

		Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore	Proposer Response Y N 3P C F					Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. **Proposer Response Legend:** Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported	Applicable Module(s)
		and notes displaying work order or asset location.							
86	I	Describe dispatch and routing capabilities for the EAM using maps so crews can be directed to assigned service requests/work orders as efficiently as possible. Captured in 89	Y						Maximo Spatial (Included)
87	R	Create location-based reports (geo-reports) of assets or work orders based on geographic region or user defined areas and subjects. For example: how many work orders were completed last year in a specific District, neighborhood or groups of neighborhoods? Or how many flooding service calls were reported in a user-defined area?	Y						Maximo Spatial (Included)
	R	Asset Record Tracking, Inspection and Condition Analysis							
88	R	Asset master record that supports, including but not limited to any of the following attributes: category, sub-category, asset number, related numbers (e.g. serial number, Proposer number, etc.), parent/child relationships, acquisition date, install date, disposal date, expected useful life, location, department, person asset is assigned to, GPS coordinates, unit of measure (lineal feet, cu. Meter), AP Voucher #, PO #, Proposer, warranty information, disposal cost, salvage value,	Y						Maximo Asset Management

		Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore	Proposer Response Y N	3P	C	F	Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. **Proposer Response Legend:** Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported	Applicable Module(s)
		as-built diagram, photo, related nested assets and various attachments.						
89	R	Briefly describe your best practices for the asset creation process (e.g. create asset and numbers in GIS, then push to EAM; or create asset and numbers in EAM, then push to GIS; or both; or without push). Do they vary by asset type? Presentation Question then delete	Y				Maximo supports two way integration for asset creation. In general, best practice is that the asset is created within the GIS and then linked to Maximo data. However, business process and asset class may drive different scenarios. During implementation, Starboard will be able to make a recommendation that will best support the City's business.	Maximo Spatial (Included)
90	R	Ability to capture inventory of roadway and Storm Water system features that are not traditionally considered “assets,” such as pavement surface, shoulders, ditches, back slopes, and enclosed conveyance systems. All system functionality associated with traditional assets must apply to these inventory features.	Y					Maximo Asset Management
91	R	Capture several dates on asset master record (e.g. original date put into service, refurbished, warranty work completed, etc.).	Y					Maximo Asset Management
92	I	Capture dimensional attributes of an asset and its components (e.g. shape of an underground vault, location of components).	Y					Maximo Asset Management
93	R	Ability to add and adjust asset information with permissions – warranty, expected life of asset, etc.	Y					Maximo Asset Management

		Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore	Proposer Response Y N 3P C F					Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. **Proposer Response Legend:** Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported	Applicable Module(s)
94	I	Field ability to pull up as-built diagrams, image files, multimedia files etc.	Y						Maximo Asset Management
95	R	Easily transfer an asset and all related records and history to another location or facility, tied to GIS.	Y						Maximo Asset Management
96	R	Ability to group assets within a category and area in GIS format to help schedule and coordinate preventive maintenance activities.	Y						Maximo Asset Management
97	I	Ability to track asset and infrastructure maintenance within a user definable geographic boundary.	Y						Maximo Asset Management
98	R	Track asset activities and history for unlimited years (e.g. repairs, replacement, refurbishment, maintenance, upgrades, retirement, abandon-in-place, disposal cost, etc.).	Y						Maximo Asset Management
99	I	Ability to collect and store condition assessment data against an asset e.g. number of leaks, number of repairs, defects, thickness measurements, anode deterioration, safety issues, etc.	Y						Maximo Asset Management
100	R	Captures and stores for assets the results of various inspections such as the City's NDPES SWOPS, flow monitoring, I/I investigations, smoke testing, hydrant flow testing, back-flow preventions devise testing, pump efficiency testing, etc.	Y					Based on the use of inspection results, they can be stored as Attached Documents, or Maximo will allow integration into data fields/tabs.	Maximo Asset Management

		Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore	Proposer Response Y N	3P	C	F	Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. **Proposer Response Legend:** Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported	Applicable Module(s)
101	R	Inspections must provide flexibility for user defined fields and forms.	Y				See line 100.	Maximo Asset Management
102	R	Ability to define custom inspection observations with weighted scoring by asset type. Weighted scoring should result in a condition score on the asset. Scoring weights should be defined by city.	Y					
103	R	Ability to conduct a condition analysis from within the map interface, combining inspection data and GIS attributes which results in the selection of assets based on condition score range.	Y					Maximo Asset Management
104	R	Ability to summarize asset condition by heat maps.	Y					Maximo Asset Management
105	R	Must have the ability to perform asset condition modeling, depreciation and valuation completely without reliance on outside software.	Y					Maximo Asset Management
106	I	Ability to use all geographic area map services available to perform geospatial queries such as "select and map display all assets inspected on a certain date in a specific neighborhood."	Y					Maximo Asset Management
107	I	Ability to use all geographic area map services available to perform geospatial queries such as "select and map display all assets inspected on a certain date in a user defined area."	Y					Maximo Asset Management

		Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore	Proposer Response Y N	3P	C	F	Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. **Proposer Response Legend:** Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported	Applicable Module(s)
108	R	Condition tracking with actual useful life, customer-defined conditions, replacement cost and time analysis independent of financial depreciation.	Y					Maximo Asset Management
109	R	Ability to track and manage compliance reporting, develop risk profiles, status of agreements, permits, etc. pertaining to the condition of assets.	Y					Maximo Asset Management
110	I	Provide configurable alerts based on asset conditions and level of service.	Y					Maximo Asset Management
111	R	Field ability to remotely pull up the complete history of an asset. Field ability to update or add an asset.	Y					Maximo Asset Management
112	I	Ability to track assets within a building. E.g. Conference Rooms, restrooms, card readers.	Y					Maximo Asset Management
	R	Asset Lifecycle Management						
113	R	Briefly discuss your asset lifecycle management functionality. E.g. asset productivity, analyze lifecycle and lifecycle costs of asset, types of assets, risk assessment and risk management and categories of assets in compliance with utility asset management standards. Discuss your experience.	Y				IBM Maximo tracks a variety of factors that can be used in evaluating an asset's life span including depreciation, total maintenance costs and year-to-date maintenance costs, replacement costs, original purchase price, asset condition, asset downtime, asset condition readings, and other pertinent attributes. IBM Maximo will monitor asset compliance, calculate risk and criticality of work on an asset, asset contracts, permits and safety plans, and can provide an asset health score.	Maximo Asset Management

		Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore	**Proposer Response** **Y N** **3P** **C** **F**					**Comments** *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. **Proposer Response Legend:** Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported	**Applicable Module(s)**
114	R	Briefly discuss how you comply with utility asset management standards for properly handling assets for water, wastewater and storm water utilities. E.g. tracking assets, asset classifications, cost categories, asset life, and risk assessment.	Y					Starboard's Foundation Solution for Maximo comes pre-seeded with foundational data for Utilities such as Crafts, Calendars, Shifts, asset classification and profile data, failure hierarchy for root cause analysis, asset risk (calculated as PoF x CoF with data entry points for each element), work types, work statuses, asset statuses, scored priority for backlog management, and Service Level Agreements for customer response management.	Maximo Asset Management
115	I	Put in an asset #, address, cross street or other attribute and see planned projects impacting that asset (e.g. for linear/horizontal asset, see other utility maintenance work projects, overlays, CIP).	Y						Maximo Asset Management
116	I	Predictive analysis for asset useful life and lifecycle maintenance.	Y						Maximo Asset Management
117	I	Manage and track all construction and maintenance costs for non-City assets for which ownership is later transferred to the City. E.g. a developer owns and pays for the construction of his own water and sewer system (the City could be in charge of doing the construction for the developer). After two years and passing City warranty and compliance requirements, ownership is then	Y					This business process will need to be defined during implementation.	Maximo Asset Management

		Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore	Proposer Response Y N	3P	C	F		Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. **Proposer Response Legend:** Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported	Applicable Module(s)
		transferred to the City. Transfer could be at no cost, but asset value and ongoing asset maintenance costs need to be tracked.							
118	I	Plant equipment depreciation tied to utility asset lifecycle calculations (predictions of useful life based on historical data). This is different from accounting depreciation.	Y						Maximo Asset Management
119	N	Side-by-side visual comparisons of an asset from one inspection vs. another. E.g. visual comparison of a segment of pipe inspected and photographed in 2011 vs. inspected and photographed in 2007.	Y					Attached Documents will allow for two windows open for side-by-side comparison.	Maximo Asset Management
	R	Parts/Supplies Inventory							
120	I	Support multi-location inventory warehouses for supplies, parts, and equipment/assets where the same item number may be in inventory in multiple locations.	Y						Maximo Asset Management
121	I	Easily transfer supplies, parts, etc. from one warehouse location to another. Update records and credit/charge impact for each department involved.	Y						Maximo Asset Management
122	R	Ability to assign asset to one or more business units and be able to transfer between units.	Y						Maximo Asset Management
123	R	Ability to create categories, assign assets, re-categorizes assets.	Y						Maximo Asset Management

		Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore	Proposer Response Y N	3P	C	F		Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. **Proposer Response Legend:** Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported	Applicable Module(s)
124	R	Experience interfacing with financial systems for purchasing, matching and valuation.	Y						Maximo Asset Management
125	R	Ability to individually create or archive assets.	Y						Maximo Asset Management
126	I	Min/max order quantities and re-order lead times that trigger suggested purchase requisitions.	Y						Maximo Asset Management
127	I	Ability to value parts individually or in groups (e.g. single valve cover, all valve covers).	Y					Maximo values inventory items (both assets and spare parts at an inventory item level). Once procured, individual assets will retain their individual valuation.	Maximo Asset Management
128	I	Support bar code reading for additions and depletions to inventory. Or do you have a barcoding system apart of the system? Explain if you have partnerships with hardware providers.	Y					Maximo utilizes barcodes as key entry and does not require any specific hardware. Maximo can utilize smart device cameras, hand held barcode readers or other devices.	Maximo Asset Management
129	I	Easily return materials to inventory that were not used on a work order or service call.	Y						Maximo Asset Management
130	I	A-B-C cycle counting tools/scheduling for parts, supplies, and equipment/assets inventories.	Y						Maximo Asset Management
	R	Preventive Maintenance (PM)/Scheduling							
131	R	Define Preventive Maintenance Tasks to include default information: area, category, sub-category, tasks, procedures, hours,	Y						Maximo Asset Management

		Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore	Proposer Response Y N	3P	C	F	Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. **Proposer Response Legend:** Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported	Applicable Module(s)
		materials, equipment, skill set, staff assignment, etc.						
132	R	Maintenance triggers and schedule based on customer defined parameters such as warranty expiration, usage hours, flow volumes, asset age, environmental conditions, average expected life, time milestones (e.g. every 5 years), etc.	Y				Maximo Preventive Maintenance triggers on frequency and usage. Condition monitoring triggers on reading setpoints. Other maintenance triggers can be achieved via Maximo Escalations.	Maximo Asset Management
133	R	Ability to schedule equipment preventive maintenance and track and report on results.	Y					Maximo Asset Management
134	I	Create and maintain a calendar and schedule for staff, activities, maintenance, and offer workload management features.	Y					Maximo Asset Management
135	R	Auto-generate work orders with default information from predefined Preventive Maintenance tasks.	Y					Maximo Asset Management
136	R	Create a single preventive maintenance work order for like horizontal assets.	Y					Maximo Asset Management
137	R	Handle preventive maintenance management and asset management for vertical assets (e.g. a building and its components).	Y					Maximo Asset Management
138	R	Handle preventive maintenance management and asset management for linear assets. E.g. pipes, pumps, meters, etc. that comprise a whole main system, enclosed drainage systems, shoulders,	Y					Maximo Asset Management

		Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore	Proposer Response Y N 3P C F					Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. **Proposer Response Legend:** Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported	Applicable Module(s)
		ditches, back slopes, and paved roadway surfaces.							
139	I	Performance-based asset maintenance. E.g. tied to incident reports and SCADA detail.	Y						Maximo Asset Management
140	R	Report on condition of assets (customer defines conditions; different conditions for different assets). E.g. Condition of chambers, pipe nodes, etc.)	Y						Maximo Asset Management
141	R	Provide ability to schedule inspection and condition monitoring of assets and inventory and create work orders and task level workload and budget forecasts for all maintenance activities.	Y						Maximo Asset Management
142	R	Customer defined inspection templates (e.g. test results, photos, checklist of inspections activities, etc.)	Y						Maximo Asset Management
	R	Work Management							
143	R	Unlimited Work Order attributes such as Department, Division, group, category, sub-category, SLA by category, status, location, Project #, Service Order #, description, incident reported time and date, completion time and date, assigned staff, labor hours and cost by technician, material quantities and cost, cause code, solution, test results, user defined fields, etc.	Y						Maximo Asset Management

		Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore	Proposer Response Y N 3P C F					Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. **Proposer Response Legend:** Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported	Applicable Module(s)
144	R	Assign resources to work orders" to see how many people and what materials and equipment are needed (generally) to perform standard tasks.	Y						Maximo Asset Management
145		Ability for resource allocation so that work orders are tied to available staff, materials and equipment. I.e. a person can't be assigned work orders exceeding their shift hours, work orders cannot be assigned to equipment that is out for maintenance, or for materials that are out of stock, without appropriate warnings and overrides.	Y						Maximo Asset Management
146		Ability to provide Dynamic Master Planning - Integrated and continuous updating and planning for water, sewer, and stormwater systems	Y						Maximo Asset Management
147	R	Create and assign priority and status criteria for work orders via defined service levels.	Y						Maximo Asset Management
148	R	Ability to define unlimited work order activity types for any asset type defined in GIS.	Y						Maximo Asset Management
149	R	Ability to generate work orders from service requests, creating relationships between work orders, and attaching work orders to any number of assets or to locations without assets.	Y						Maximo Asset Management

		Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore	Proposer Response Y N	3P	C	F	Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. **Proposer Response Legend:** Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported	Applicable Module(s)
150	R	The work order system should track parts, labor, equipment, and other costs/resources associated with the work activity.	Y					Maximo Asset Management
151	R	Costs should be associated to assets on the work order and asset costs should be easily reportable from with the system.	Y					Maximo Asset Management
152	R	Should support capability to dispatch work orders to work crews. Work crews should be able to access and prioritize work orders by multiple attributes.	Y					Maximo Asset Management
153	R	Ability to create work requests from inside the map interface. Ability to view all work activities on a map and label by priority, status, type, etc.	Y					Maximo Asset Management
154	R	Track relationship between service request and work order.	Y					Maximo Asset Management
155	R	Ability for personnel to select and review work requests and work orders using multiple selection and sorting criteria that include all work request, work order fields, and any geographic area available in the enterprise geodatabase.	Y					Maximo Asset Management
156	R	Ability to view all work activities on a map and label by priority, status, type, etc.	Y					Maximo Asset Management
157	I	Ability to attach multimedia files to work order.	Y					Maximo Asset Management

		Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore	Proposer Response Y N	3P	C	F	Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. **Proposer Response Legend:** Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported	Applicable Module(s)
158	I	Ability to organize work orders and associated costs to project with a budget.	Y					Maximo Asset Management
159	I	Ability to modify (hide, relocate, repurpose, etc.) all fields on end user forms/screens.	Y					Maximo Asset Management
160	I	Ability to establish required fields so as to ensure data input integrity.	Y					Maximo Asset Management
161	N	Ability to assign maintenance scores to work activity types.	Y					Maximo Asset Management
162	R	Must be able to update GIS attributes with fields from the work management system automatically (no manual or scheduled push to GIS).	Y					Maximo Asset Management
163	I	Must be able to report on total cost of maintenance for one or many selected assets.	Y					Maximo Asset Management
164	N	Ability to view work activities on a calendar.	Y					Maximo Asset Management
165	R	Ability to use all geographic area map services available to perform geospatial queries such as "select and map display work on a certain date in a specific neighborhood."	Y					Maximo Asset Management
166	R	Ability to use all geographic area map services available to perform geospatial queries such as "select and map display work on a certain date in a user defined area."	Y					Maximo Asset Management

		Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore	Proposer Response Y N	3P	C	F	Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. **Proposer Response Legend:** Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported	Applicable Module(s)
167	I	Provide escalation process and approvals for emergency and priority requests.	Y					Maximo Asset Management
168	R	Notify user upon work order creation that a similar work order for the same asset already exists.	Y					Maximo Asset Management
169	R	Allow assets without fixed locations to be added to work orders (e.g. right of way mowing).	Y					Maximo Asset Management
170	R	Allow work orders to be created and closed without assets tied to them.	Y					Maximo Asset Management
171	R	Ability to modify work order type.	Y					Maximo Asset Management
172	R	Track materials issued to a work order; interface to Inventory module for automated adjustments to inventory levels.	Y					Maximo Asset Management
173	R	Generate a Work Order that includes maintenance on multiple assets.	Y					Maximo Asset Management
174	R	Generate a single Work Order that includes multiple tasks or activities.	Y					Maximo Asset Management
175	R	Groups associated or nested assets and create a single work order for that group. For example a storm water detention system could consist of multiple assets of different types, so the EAM should allow users to create a work order against the	Y					Maximo Asset Management

		Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore	Proposer Response Y N 3P C F					Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. **Proposer Response Legend:** Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported	Applicable Module(s)
		detention system that includes all its associated assets.							
176	I	Connect follow-up or subordinate work orders to a primary or original work order.	Y						Maximo Asset Management
177	I	Ability to group work orders into a “project.”	Y						Maximo Asset Management
178	R	Ability to categorize and enter into system work orders that represent work done for a calamitous (FEMA) event.	Y						Maximo Asset Management
179	I	Ability to assign status to work order as a whole, or to individual tasks or activities within it, update that assignment and check on progress.	Y						Maximo Asset Management
180	R	Automatically generate recurring work order based on schedule defined by user, WO or asset type. Allow override of default parameters.	Y						Maximo Asset Management
181	R	Ability to schedule and assign preventative or routine work orders for future and planned maintenance.	Y						Maximo Asset Management
182	R	Ability to create standard pick lists of employees, materials, equipment for assignment to work orders.	Y						Maximo Asset Management
183	R	Ability to generate a daily work list for staff based on work orders and assigned tasked and estimated time to complete them.	Y						Maximo Asset Management

		Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore	Proposer Response Y N 3P C F					Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. **Proposer Response Legend:** Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported	Applicable Module(s)
184	R	Ability for leads to view activities and status of each crew.	Y						Maximo Asset Management
185	I	Ability to schedule closures; shut downs by date, or by date and time.	Y						Maximo Asset Management
186	I	Notification to field crews that an update to a work order has been made.	Y						Maximo Asset Management
187	R	Provide costs and percent complete of delineated program; i.e. measuring progress on street sweeping.	Y						Maximo Asset Management
188	E	Capture time entry direct from field staff or via integration to Kronos. Please describe your functionality. The goal would be one point of entry for time capture and leave requests that then automatically feed Payroll and HR, project accounting, and work order activity reporting.	Y					Maximo can capture time on each work order and then send that information to Kronos via the Maximo Integration Framework. The opposite integration is also possible (enter into Kronos and send to Maximo). Starboard will help the City come to the best integration scenario during implementation.	Maximo Asset Management
189	R	Capture multiple lines of time entry per work order spanning dates and different employees and Proposers.	Y						Maximo Asset Management
190	I	Ability to account for non-productive time or time not associated with an asset so that all personnel time is captured for timekeeping interface and labor distribution reports.	Y						Maximo Asset Management
191	I	Ability to collapse the project time tracking detail into categories for payroll purposes: E.g. .5 hours on water main, .5 hours on	Y						Maximo Asset Management

		Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore	Proposer Response Y N 3P C F					Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. **Proposer Response Legend:** Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported	Applicable Module(s)
		drain pipe collapses to 1.0 hours regular time for payroll purposes.							
192	I	Discuss how your application synchronizes after temporarily losing cell data connectivity (e.g. the work is done in the basement with no data coverage).	Y					Starboard's Foundation Solution comes with a connected mobile solution. For disconnected mobile, Starboard offers two optional solutions. After further discussion with the City, Starboard will make a final recommendation.	Maximo Anywhere (optional) or Datasplice (optional)
	R	Request Management & Call Center							
193	R	The EAMS software should provide functionality for logging, mapping, and tracking calls for service.	Y						Maximo Service Provider (optional)
194	R	Ability to define service request types and user defined caller questions, instructions and comments.	Y						Maximo Service Provider (optional)
195	R	Ability to log calls from internal and external customers.	Y						Maximo Service Provider (optional)
196	R	Ability to turn caller information recorded on a Call Center Work Request into Work Orders.	Y						Maximo Asset Management
197	R	Ability to select calling customer's address and/or name from list generated from billing application.	Y						Maximo Service Provider (optional)
198	R	Ability to record information regarding caller if different from property owner.	Y						Maximo Service Provider (optional)
199	R	Uses ESRI Geocoding services for address locator, including cross streets.	Y						Maximo Asset Management

		Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore	Proposer Response Y N 3P C F					Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. **Proposer Response Legend:** Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported	Applicable Module(s)
200	R	Ability to route request to city staff by geographic layer as defined in the GIS.	Y						Maximo Asset Management
201	R	Ability to track multiple callers per request.	Y						Maximo Service Provider (optional)
202	R	System should prompt call taker if there is an open request of the same type in the same general area so as to reduce duplicate effort.	Y						Maximo Asset Management
203	R	Link multiple Service Orders (generated from citizen requests/complaints) to a single Work Order.	Y						Maximo Asset Management
204	R	The system must directly interface with Outlook email program so that a work request is easily replicated into an email to send outside the software.	Y						Maximo Asset Management
205	R	Ability to use all geographic area map services available to perform geospatial queries such as "select and map display all requests in a specific neighborhood."	Y						Maximo Asset Management
206	R	Ability to use all geographic area map services available to perform geospatial queries such as "select and map display all requests in a user defined area."	Y						Maximo Asset Management
207	I	Provide a web-based portal for the public (external customers) to create and submit requests for service.		3P				Maximo is web architected but does not function as a web portal for external customers. Maximo can integrate to 3rd party web portal tools. Alternately, customers can use email to initiate and submit requests for service.	

		Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore	Proposer Response Y N	3P	C	F	Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. **Proposer Response Legend:** Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported	Applicable Module(s)
208	R	Provide a web-based portal for City employees (internal customers) to create and submit requests for service.	Y				Internal employees can utilize Maximo's web architecture to submit request for services.	Maximo Asset Management
209	R	Alerts for multiple service requests for the same asset/feature.	Y					Maximo Asset Management
210	R	Assign priorities for service requests based on service type, service level, and supporting authorized user overrides.1	Y					Maximo Asset Management
211	R	Track service requests or work orders by date, geographic area, asset, type, priority, assignment and duration.	Y					Maximo Asset Management
212	R	Track all service request costs, both reactive and emergency work. Ability to breakout a priority level for emergency service requests.	Y					Maximo Asset Management
213		Ability to automatically e-mail customer the status of a Customer Service Request as it is processed.	Y					Maximo Asset Management
	R	Billing						
214	R	Generate report to identify Work Orders that have been flagged as billable.	Y					Maximo Service Provider (optional)
215	R	Integration with ERP Accounts Receivable for invoice creation and distribution.	Y					Maximo Asset Management
216	R	Support asset planning and budgeting process (e.g. FTE staff level planning to support desired service levels, costs to perform maintenance tasks, etc.).	Y					Maximo Asset Management

		Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore	Proposer Response Y N	3P	C	F	Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. **Proposer Response Legend:** Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported	Applicable Module(s)
217	I	Ability from one Work Order to allocate labor and material costs to separate departments for shared projects, cross-billing, chargebacks and facilities.	Y					Maximo Asset Management
	R	Reporting						
218	R	Indicate reporting tools offered. If 3rd party, list Proposer. Discuss integration to core suite and strategy to stay current with version releases.	Y				Maximo comes with BIRT Reporting (open source), Key Performance Indicators, Cognos, and can utilize Watson Analytics (additional cost).	Maximo Asset Management
219	R	Describe data output formats (e.g. XML, Excel, CSV, etc.)	Y				Maximo can export data into MS Excel (on screen, user level), CSV, XML. Reports can also be sent to MS Word or .pdf.	Maximo Asset Management
220	R	Search and report on all fields in database, including user-defined fields, with ability to organize, summarize, sort, and sub-total in a variety of ways.	Y					Maximo Asset Management
221	I	Intuitive ad hoc query and reporting for users with wild card search and drop down lists. Search, sort, set report parameters (e.g. date ranges). Allows easy access to the data for report and query generation without the need for a programming specialist.	Y					Maximo Asset Management
222	R	Reporting by date range and combinations of other parameters.	Y					Maximo Asset Management
223	I	Customer-defined exception reporting.	Y					Maximo Asset Management

		Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore	Proposer Response Y N	3P	C	F	Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. **Proposer Response Legend:** Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported	Applicable Module(s)
224	R	Save a query as a report on desktop or to a library in the system for re-use in future.	Y					Maximo Asset Management
225	I	Modify report templates or standard reports and save new format for use in the future.	Y					Maximo Asset Management
226	I	Access reports through graphical dashboard display.	Y					Maximo Asset Management
227	I	Executive Dashboard tailored to each user. Describe.	Y					Maximo Asset Management
228	N	Ability to integrate EAM dashboard parts into an Enterprise dashboard	Y					Maximo Asset Management
229	I	Ability to generate -, track and report on key performance indicators, accomplishments, variances, failures and issues.	Y					Maximo Asset Management
230	I	Built-in graph and charting capabilities.	Y					Maximo Asset Management
231	N	Drill down from report line item to detail transaction level.	Y					Maximo Asset Management
232	N	Search on comments fields.	Y					Maximo Asset Management
233	I	Ability to report staff time across at least two dimensions: the activity performed and the project the activity was completed on.	Y					Maximo Asset Management

BID/PROPOSAL CERTIFICATION

Please Note: If responding to this solicitation through BidSync, the electronic version of the bid response will prevail, unless a paper version is clearly marked **by the bidder** in some manner to indicate that it will supplant the electronic version. All fields below must be completed. If the field does not apply to you, please note N/A in that field.

If you are a foreign corporation, you may be required to obtain a certificate of authority from the department of state, in accordance with Florida Statute §607.1501 (visit http://www.dos.state.fl.us/).

Company: (Legal Registration) Starboard Consulting, LLC

Address: 2170 West State Road 434, Suite 124

City: Longwood State: FL Zip: 32779

Telephone No. 407-622-6414 FAX No. 407-622-6417 Email: kbuck@starboard-consulting.com

---

Delivery: Calendar days after receipt of Purchase Order **(section 1.02 of General Conditions)**: TBD

Total Bid Discount **(section 1.05 of General Conditions)**: 40% software

Does your firm qualify for MBE or WBE status **(section 1.09 of General Conditions)**: MBE ☐ WBE ☑

ADDENDUM ACKNOWLEDGEMENT - Proposer acknowledges that the following addenda have been received and are included in the proposal:

Addendum No.	Date Issued	Addendum No.	Date Issued	Addendum No.	Date Issued
1	5/16/17				

VARIANCES: If you take exception or have variances to any term, condition, specification, scope of service, or requirement in this competitive solicitation you must specify such exception or variance in the space provided below or reference in the space provided below all variances contained on other pages within your response. Additional pages may be attached if necessary. No exceptions or variances will be deemed to be part of the response submitted unless such is listed and contained in the space provided below. The City does not, by virtue of submitting a variance, necessarily accept any variances. If no statement is contained in the below space, it is hereby implied that your response is in full compliance with this competitive solicitation. If you do not have variances, simply mark N/A. **If submitting your response electronically through BIDSYNC you must also click the "Take Exception" button.**

N/A

The below signatory hereby agrees to furnish the following article(s) or services at the price(s) and terms stated subject to all instructions, conditions, specifications addenda, legal advertisement, and conditions contained in the bid/proposal. I have read all attachments including the specifications and fully understand what is required. By submitting this signed proposal I will accept a contract if approved by the City and such acceptance covers all terms, conditions, and specifications of this bid/proposal. The below signatory also hereby agrees, by virtue of submitting or attempting to submit a response, that in no event shall the City's liability for respondent's direct, indirect, incidental, consequential, special or exemplary damages, expenses, or lost profits arising out of this competitive solicitation process, including but not limited to public advertisement, bid conferences, site visits, evaluations, oral presentations, or award proceedings exceed the amount of Five Hundred Dollars ($500.00). This limitation shall not apply to claims arising under any provision of indemnification or the City's protest ordinance contained in this competitive solicitation.

Submitted by:

PROPOSAL SIGNATURE PAGE

Karen Buck	
Name (printed)	Signature
6-2-2017	Executive Director
Date:	Title

SECTION VI – FEE PROPOSAL SUMMARY PAGE (See Form 2 for Fee Proposal Details)

Proposer Name: Starboard Consulting

Proposer agrees to supply the products and services at the prices bid below in accordance with the terms, conditions and specifications contained in this RFP.

Cost to the City: Proposer must quote firm, fixed, costs for all services/products identified in this request for proposal. These firm fixed costs for the project include any costs for travel and miscellaneous expenses. No other costs will be accepted.

Notes: Attach a breakdown of costs including but not limited to labor, equipment, materials and parts. Include all cost under Item 1 below, add the letter in front of the dollar sign for the solution you are proposing. i.e. b. $_____.

1.	a. Software (On-Premises City Hosted)	$ a. 428,622.00
	b. Software as a Service	$ b. 292,147.00
	a. Combination of Hosted and Service	$_____
2.	Hardware	$_____
3.	Implementation Cost	$ 1,258,116.00
4.	Training Cost	$ 293,904.00
5.	Additional Equipment/Material (List in Detail)	$_____
6.	List and Explain Any Other Cost not Included	$_____
Total Project Cost		**$ 1,980,642.00**

Submitted by:

Karen A. Buck
Name (Printed) Signature

Executive Director
6-2-2017
Date Title

FORM 2: FEE PROPOSAL

INSTRUCTIONS
There are several pricing forms to be completed:

1. On-Premises City Hosted * (See 8 Below)
2. Hosted or Software-as-a-Service
3. Or a combination of the 1 and 2 above

If you only provide one option, please complete the applicable form. If you provide both options please complete both forms. Also note if there are any other options that you provide and complete an applicable form for those options.

<table>
<tr><th colspan="3">On-Premises City Hosted License Pricing</th></tr>
<tr><td>1</td><td>Briefly describe your estimating approach and the basis for your proposed pricing.</td><td>The Maximo license types and numbers we have quoted are based on estimates from your RFP as well as your response to questions asked about user counts and user types. Once we meet with you and learn more about your user needs and numbers we will be able to properly adjust the actual number of Maximo licenses you will need.</td></tr>
<tr><td>2</td><td>Briefly describe your fee structure for professional services.</td><td>Rates are valid through 12/31/18
<table>
<tr><th>Role</th><th>Rate</th></tr>
<tr><td>Solution Director</td><td>$200</td></tr>
<tr><td>Project Manager</td><td>$200</td></tr>
<tr><td>Functional Lead</td><td>$195</td></tr>
<tr><td>Technical Architect</td><td>$195</td></tr>
<tr><td>Technical Lead</td><td>$185</td></tr>
<tr><td>Application Developer</td><td>$165</td></tr>
</table></td></tr>
<tr><td>3</td><td>Discuss how you will discount the software, maintenance/support and services rate for us.</td><td>With regards to the Maximo software we are offering the city a significant discount for the purchase of all licenses which will be honored until November 30th 2017.</td></tr>
</table>

4	Prices and rates must be locked in for three years.	Maximo is an IBM product and they will be willing to discuss this request during contract negotiations. Starboard Consulting is the implementer and we are open to discussing locking our services rates to the city for the three years requested.
5	Provide a summary of costs excluded from this proposal	All costs associated with our responses have been submitted.
6	Provide a preliminary payment schedule, keeping in mind that we are not allowed to pay for goods and services in advance. There is a retainer of 10% to be paid upon final acceptance by the City. Final acceptance: After go-live (the first production use of the software); the City will have 60 days to test the software in a production environment and to develop a list of non-conforming elements to be corrected by the supplier. Final acceptance will take place when the City agrees in writing that all of the non-conforming elements have been corrected except for minor or inconsequential errors.	Starboard Consulting will work with the city in creating a payment schedule / timeline which will be mutually acceptable to both parties for the services we will be providing. The purchase of the Maximo licenses from IBM must be paid at time of purchase. This is IBM policy and something they do not deviate from. As one of the largest publicly traded software companies in the world they cannot offer special purchase terms to organizations.
7	We own a site license for ESRI ArcGIS products and do not plan to pay for additional licenses as part of this acquisition. Can you honor that, and if not, why not?	The implementation of Maximo along with the integration to ESRI does not require additional license costs from our side for ESRI products.
8	*List hardware and other any other software or items required for the City to host. Also suggest/recommend a backend server configuration with the amount and whether they are virtual or physical and the storage requirements.	Please refer to our Maximo Hardware and Software document on the following pages for all these details.

SOFTWARE LICENSE	$	ASSUMPTIONS
Asset Record Tracking		Refer to our Software Costs sheet
Asset Lifecycle Management		Refer to our Software Costs sheet
Parts/Supplies Inventory		Refer to our Software Costs sheet
Preventive Maintenance/Scheduling		Refer to our Software Costs sheet
Work Management		Refer to our Software Costs sheet
Work Order Billing		Refer to our Software Costs sheet
Reporting		Refer to our Software Costs sheet
ESRI ArcGIS integration		Refer to our Software Costs sheet
Other: (Describe)		Refer to our Software Costs sheet

List any optional modules required outside of the basic foundational modules not included in the core module price		Refer to our Software Costs sheet
Sub-Total: Core Modules	$428,622.00	
Optional: (Describe)	N/A at this time.	
Sub-Total: Software License	$428,622.00	
IMPLEMENTATION	**$**	**ASSUMPTIONS**
Implementation	$293,904.00	
Data Conversion	$293,904.00	
Training	$293,904.00	
Data Collection	$293,904.00	
Integration	$293,904.00	
Customization		
Travel Expenses	$82,500.00	
Other: (Describe)		
Sub-Total: Implementation	$1,552,020.00	
Ratio: Implementation Cost to License Cost (E.g. 2:1)	3:1	
ANNUAL MAINTENANCE and SUPPORT	**$**	**ASSUMPTIONS**
Year 1	N/A	First year of S&S maintenance is included with the purchase of the software.
Year 2	$85,724.40	
Year 3	$94,296.84	
Year 4	$103,726.52	
Year 5	$114,099.17	
Year 6	$125,509.09	
Year 7	$138,060.00	

Year 8	$151,866.00	
Sub-Total: Maintenance & Support	$813,282.03	
Maintenance & Support Cost Calculation Formula (e.g. 18% of purchase price)	IBM S&S cost for 1st year is calculated at 20% of purchase price of the software.	For maintenance subscription and support budgeting purposes we recommend you use 10% as the yearly increase. It could be less if you are open to discuss payment upfront for multiple years.
Include any Service Level Agreements and Terms	Starboard will work with the city to address any SLA it deems are needed.	
GRAND TOTAL	**$2,793,924.03**	**License, Implementation, Eight (8) Years, Maintenance**

<table>
<tr><th colspan="3">Hosted Or Software-as-a-Service (SAAS) Pricing</th></tr>
<tr><td>1</td><td>Are you proposing a Hosted or Software-as-a Service (SaaS) option? Briefly describe. You may attach a copy or be prepared to provide upon request.</td><td>Starboard can provide either a Hosted or SaaS option for the city to consider. We recommend the On-Premise model, taking advantage of the system management and control processes already in place for the City's enterprise applications.</td></tr>
<tr><td>2</td><td>Briefly describe your estimating approach and the basis for your proposed pricing.</td><td>The Maximo license types and numbers we have quoted are based on estimates from your RFP as well as your response to questions asked about user counts and user types. Once we meet with you and learn more about your user needs and numbers we will be able to properly adjust the actual number of Maximo licenses you will need.</td></tr>
<tr><td>3</td><td>Briefly describe your fee structure for professional services.</td><td><table><tr><th>Role</th><th>Rate</th></tr><tr><td>Solution Director</td><td>$200</td></tr><tr><td>Project Manager</td><td>$200</td></tr><tr><td>Functional Lead</td><td>$195</td></tr><tr><td>Technical Architect</td><td>$195</td></tr><tr><td>Technical Lead</td><td>$185</td></tr><tr><td>Application Developer</td><td>$165</td></tr></table>Rates valid through 12/31/2018</td></tr>
<tr><td>4</td><td>Discuss how you will discount the subscription, maintenance/support and service rate.</td><td>Refer to our response above for the On-Premise pricing.</td></tr>
<tr><td>5</td><td>Prices and rates must be locked in for three years.</td><td>Refer to our response above for the On-Premise pricing.</td></tr>
<tr><td>6</td><td>Provide a summary of costs excluded from this proposal</td><td>Refer to our response above for the On-Premise pricing.</td></tr>
<tr><td>7</td><td>Provide a preliminary payment schedule, keeping in mind that we are not allowed to pay for goods and services in advance. We also require a hold back of 20% to be paid upon final acceptance by the City. Final acceptance: After go-live (the first production use of the software); the City will have 60 days to test the software in a production</td><td>Refer to our response above for the On-Premise pricing.</td></tr>
</table>

	environment and to develop a list of non-conforming elements to be corrected by the supplier. Final acceptance will take place when the City agrees in writing that all of the non-conforming elements have been corrected except for minor or inconsequential errors.	
8	We own a site license for ESRI ArcGIS products and do not plan to pay for additional licenses as part of this acquisition. Can you honor that, and if not, why not?	Refer to our response above for the On-Premise pricing.
9	For the hosted or SaaS state the required average bandwidth per concurrent users (175/200)	Our cloud is designed on enterprise grade infrastructure and with redundancy built in to make sure Maximo is always running. This includes the power and high availability provided by VMWare Enterprise virtualization running on an EMC fiber channel SAN and multi-processor, 6-8 core servers. Our solution provides a running instance of Maximo, tuned and scaled to handle your user load.

HOSTED/SAAS SUBSCRIPTION	ANNUAL SUBSCRIPTION $	ASSUMPTIONS
Asset Record Tracking		Refer to our Software Costs sheet
Asset Lifecycle Management		Refer to our Software Costs sheet
Parts/Supplies Inventory		Refer to our Software Costs sheet
Preventive Maintenance/Scheduling		Refer to our Software Costs sheet
Work Management		Refer to our Software Costs sheet
Work Order Billing		Refer to our Software Costs sheet
Reporting		Refer to our Software Costs sheet
ESRI ArcGIS integration		Refer to our Software Costs sheet
Other: (Describe)		Refer to our Software Costs sheet
List any optional modules required outside of the basic foundational modules not included in the core module price		Refer to our Software Costs sheet
Sub-Total: Core Modules	$292,147.00	Refer to our Software Costs sheet
Optional: (Describe)		Refer to our Software Costs sheet
Sub-Total: Annual Subscription	N/A for SaaS	Included in the yearly SaaS fee.
Describe any commitments. E.g. Can we terminate at any time? Is there a 1 year commitment? Etc.		SaaS pricing is done per year subscription and each year is paid upfront. Yes, you can terminate at any time without any cancellation fees.
SERVICE ELEMENTS	**ANNUAL SUBSCRIPTION $**	**ASSUMPTIONS**
Infrastructure		All these items are covered in the SaaS yearly cost.
Equipment		See above.
Telecommunications & Network		See above.
Operations Support		See above.
Client Environment Support		See above.
Disaster Recovery		See above.
Other: (Describe)		See above.
Sub-Total: Annual Service Elements Subscription		N/A
IMPLEMENTATION	**$**	**ASSUMPTIONS**

Implementation	$293,904.00	
Data Conversion	$293,904.00	
Data Collection and Entry	$176,342.00	
Data Review and Analysis	$117,562.00	
Training	$293,904.00	
Integration	$293,904.00	
Customization		
Travel Expenses	$82,500.00	
Other: (Describe)		
Sub-Total: Implementation	$1,552,020.00	
Ratio: Implementation Cost to License Cost (E.g. 2:1)	3:1	
ANNUAL MAINTENANCE and SUPPORT	**$**	**ASSUMPTIONS**
Software		The SaaS option includes all the items you have listed here.
Hardware		
Other: (Describe)		
Sub-Total: Maintenance & Support		
Maintenance & Support Cost Calculation Formula (e.g. 10% of purchase price)		
First year SaaS price for Maximo	**$292,147.00**	
GRAND TOTAL	**$1,844,167.00**	**1st Year Subscription, Service Elements, Implementation, Maintenance & Other**

If your hosted pricing does not fit into the format above, present it in a format that fits your model, but please present it in a format that is easy for us to understand.

7. Software Costs

Breakdown of Software Costs

This document describes Starboard's software pricing options for the software user count provided in the RFP. All software costs include one year of IBM Subscription and Support renewal. Starboard has estimated the number of users and license types who will need access to the system; the actual cost of software will vary based on the license type and the number of licenses purchased.

Licensing for server operating systems and database (Oracle, SQL Server) software is not included. Maximo Asset Management licenses include access to all Maximo development tools, the WebSphere Application Server, and BIRT report writing tool kit.

We would welcome the opportunity to sit down with you to further explain how the Maximo product is licensed and determine the final configuration of licenses your project will require including Mobile options.

Unit Price column reflects a significant discount off the IBM list Price.

All software license pricing is valid until November 30, 2017

Item	Maximo Product	Description	Qty	Unit	Unit Price	Total
1	Maximo Asset Management	Authorized User	49	User	$3,504.00	$171,696
2	Maximo Asset Management	Limited Authorized User	35	User	$1,758.00	$61,530
3	Maximo Asset Management	Express Authorized User	232	User	$660.00	$153,120
4	Maximo Spatial	Integration with ESRI	90	User	$118.20	$10,638
5	Maximo Spatial Server Install	Integration with ESRI	2	Server	$14,715.00	$29,430
6	Maximo Scheduler	Scheduling & Dispatching	2	User	$1,104.00	$2,208
7	Maximo Mobile Everyplace	Mobile Connected Users	316	User	$.00	$0
Total Proposed Price						**$428,622**
OPTIONAL MODULES						
8	Maximo Mobile Anywhere	Mobile Disconnected Users	1	User	$1,688.00	$1,688
9	Data Splice Mobile	Mobile Disconnected Users	1	User	$985.00	$985
10	Maximo HSE	Maximo Health Safety Environment	1	User	$1,960.00	$1,960

Maximo License description types

Primary Authorized User:
A registered user with access to all IBM Maximo Asset Management licensed applications. Can create, view and edit all records in all applications. Has full access to all reporting capabilities.

Maximo Express User:
Allows for running and viewing reports, read-only access, status changes, and updates to Work orders assigned to that user.

- 25:1 (Express/Authorized) Ratio

Limited Authorized User Licenses:
An infrequent Authorized User where use of IBM Maximo Asset Management is not primary to the user's job function. Can be used with any (3) Maximo m0dules except for the Administration Applications.

Breakdown Maintenance Costs

Maximo Annual Maintenance

Ongoing costs - After the first year, your only ongoing costs will be your renewal to Subscription & Support maintenance. S&S costs starting in year (2) are 20% of your Maximo software purchase costs and are due after the initial 12-month purchase date of the Maximo licenses.

Maintenance and upgrades costs - All Maximo products come with the first year of ongoing "S&S" Subscription & Support maintenance included. As long as you remain current on your S&S dues, all Maintenance and version upgrades to new system releases is included at no additional costs.

First Year Software Licenses Estimate for SaaS

We would like the opportunity to sit down with you to further explain how the Maximo product is licensed and determine the final configuration of the license types and numbers you will need for roll-outs.

Description	Type	# Users	Price
MAXIMO ONE-TIME SET-UP FEE	Install	1	$19,228.00
ANNUAL INTEGRATIONS PLATFORM FEE	Install	1	$4,000.00
MAXIMO ASSET MANAGEMENT	Primary Authorized	49	$102,655.00
MAXIMO SPATIAL ASSET MANAGEMENT SERVER	Install	2	$23,434.00
MAXIMO SPATIAL ASSET MANAGEMENT	Primary Authorized	90	$6,390.00
MAXIMO ASSET MANAGEMENT EXPRESS	Express	232	$98,368.00
MAXIMO ASSET MANAGEMENT LIMITED USE	Limited Authorized	35	$36,750.00
MAXIMO SCHEDULER	Primary Authorized	2	$1,322.00
	Total		**$292,147.00**

IBM Maximo 7.6 Minimum Hardware and Software Requirements

IBM Maximo uses an n-Tier architecture, which lets you deploy Maximo across one or more tiers. You can run Maximo on a single physical server or across multiple servers depending on the number of concurrent users and the hardware.
Maximo requires workstations and servers in each tier of a Maximo system configuration to have the following minimum hardware and software:

Client Workstation

This is the workstation where end users access and work with Maximo.

Hardware	Software
Intel based processor 1 GB RAM SVGA 1024 x 768 resolution	Microsoft Windows XP, Windows Vista or Windows 7 or Red Hat / SUSE Linux Microsoft Internet Explorer, 7 or 8 browser Mozilla Firefox browser 3.6 Adobe Acrobat Reader 8.0 or 9.0. Adobe Flash Player 10 must also be present on the system for Maximo Linear. **Note:** The Maximo Workflow Designer requires a Java Runtime Environment (JRE 1.6).The Workflow Designer checks for the JRE on the administrative workstation. If it does not find the JRE, Workflow Designer prompts you to install JRE.

Administrative Workstation

The system administrator workstation is where you install the Maximo application and build the EAR files before deploying them.

Hardware	Software
Intel based processor: • 2-4GHz processor (minimum) • 4 GB RAM (minimum) • 10 Mbit/s network connection between administrative workstation and middleware servers (minimum) • 11 GB disk space	Microsoft Windows Server 2003 (32/64-bit) Microsoft Windows Server 2008 (32/64-bit) Microsoft Windows Server 2008 R2 (32/64-bit) Windows XP or Vista Microsoft Internet Explorer 7 or 8 browser Mozilla Firefox browser 3.0 for Microsoft Adobe Acrobat Reader 8.0 or 9.0. Adobe Flash Player 10 must also be present on the system for Maximo Linear.

Application Server

The server where you install the IBM WebSphere or the Oracle WebLogic Application Server and typically, where you deploy Maximo EAR files.

Hardware	Software
• 2-6 GHz processor • 40 GB disk space • 6 GB RAM 1.5 GB (or greater) disk space for Maximo and the Java/Web Server components	Microsoft Windows Server 2003 (32/ 64-bit) Microsoft Windows Server 2008 (32/ 64-bit) Microsoft Windows Server 2008 R2 (32/ 64-bit) IBM AIX 6.1, 7.1 (32/ 64-bit) Red Hat Enterprise Linux 5/6 (x86 – 64 bit, zLinux) SUSE SLES 10/11 (x86 – 64 bit, zLinux) Sun Solaris 9/10 (SPARC) HP-UX 11i V3 (Itanium) VMWare ESX 3/4i/4.1 zVM KVM PowerVM PR/SM **Note:** IBM WebSphere 7.0 included with the Maximo Product. Oracle WebLogic Server 10.3 –customer provided.

Database Server

The server is where you install database software to create and maintain your Maximo database. You are responsible for maintaining database platform software.

Hardware	Software
See vendor documentation for hardware specifications.	IBM: DB2 Enterprise Server Edition 9.5.0.7 and future fix packs DB2 Enterprise Server Edition 9.7.0.3/a and future fix packs ▪ Workgroup or Enterprise Edition ▪ Configured for TCP/IP support DB2 9.8 pureScale Oracle: Oracle Database 10g 2 10.2.0.4 Oracle Database 11g Release 1 Oracle Database 11g Release 2 Standard Edition or Enterprise Edition Microsoft SQL Server 2008/2008R2 ▪ Standard or Enterprise Edition

Reporting – BIRT Version 2.3.2 is embedded with Maximo 7.6. A separate server is not required. Maximo customers also have access to the Tivoli Common Reporting Tool.

NON-COLLUSION STATEMENT:

By signing this offer, the vendor/contractor certifies that this offer is made independently and *free* from collusion. Vendor shall disclose below any City of Fort Lauderdale, FL officer or employee, or any relative of any such officer or employee who is an officer or director of, or has a material interest in, the vendor's business, who is in a position to influence this procurement.

Any City of Fort Lauderdale, FL officer or employee who has any input into the writing of specifications or requirements, solicitation of offers, decision to award, evaluation of offers, or any other activity pertinent to this procurement is presumed, for purposes hereof, to be in a position to influence this procurement.

For purposes hereof, a person has a material interest if they directly or indirectly own more than 5 percent of the total assets or capital stock of any business entity, or if they otherwise stand to personally gain if the contract is awarded to this vendor.

In accordance with City of Fort Lauderdale, FL Policy and Standards Manual, 6.10.8.3,

3.3. City employees may not contract with the City through any corporation or business entity in which they or their immediate family members hold a controlling financial interest (e.g. ownership of five (5) percent or more).

3.4. Immediate family members (spouse, parents and children) are also prohibited from contracting with the City subject to the same general rules.

Failure of a vendor to disclose any relationship described herein shall be reason for debarment in accordance with the provisions of the City Procurement Code.

NAME	RELATIONSHIPS
None - Not Applicable	

In the event the vendor does not indicate any names, the City shall interpret this to mean that the vendor has indicated that no such relationships exist.

ACORD

CERTIFICATE OF LIABILITY INSURANCE

AHB
R045

DATE (MM/DD/YYYY)
5/20/2016

THIS CERTIFICATEIS 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	CONTACT NAME:	
BIN INSURANCE HOLDINGS LLC/PHS 505301 P:(866) 467-8730 F:(888) 443-6112 PO BOX 33015 SAN ANTONIO TX 78265	PHONE (A/C, No, Ext): (866) 467-8730	FAX (A/C, No): (888) 443-6112
	E-MAIL ADDRESS:	

INSURER(S) AFFORDING COVERAGE	NAIC#
INSURER A: Hartford Casualty Ins Co	29424
INSURER B:	
INSURER C:	
INSURER D:	
INSURER E:	
INSURER F:	

INSURED

STARBOARD CONSULTING LLC
2170 W STATE ROAD 434 STE 124
LONGWOOD FL 32779

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 INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	COMMERCIAL GENERAL LIABILITY CLAIMS-MADE [X] OCCUR [X] General Liab GEN'L AGGREGATE LIMIT APPLIES PER: POLICY [ ] PRO-JECT [X] LOC OTHER:	X		46 SBM ID4482	06/18/2016	06/18/2017	EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence) MED EXP (Any one person) PERSONAL & ADV INJURY GENERAL AGGREGATE PRODUCTS - COMP/OP AGG	$2,000,000 $300,000 $10,000 $2,000,000 $4,000,000 $4,000,000
A	AUTOMOBILE LIABILITY ANY AUTO [ ] OWNED AUTOS ONLY [ ] SCHEDULED AUTOS [X] HIRED AUTOS ONLY [X] NON-OWNED AUTOS ONLY	X		46 SBM ID4482	06/18/2016	06/18/2017	COMBINED SINGLE LIMIT (Ea accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident)	$2,000,000 $ $ $
A	[X] UMBRELLA LIAB [X] OCCUR [ ] EXCESS LIAB [ ] CLAIMS-MADE DED [X] RETENTION $ 10,000			46 SBM ID4482	06/18/2016	06/18/2017	EACH OCCURRENCE AGGREGATE	$2,000,000 $2,000,000
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? Y/N [ ] (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	N/A					PER STATUTE [ ] OTH-ER E.L. EACH ACCIDENT E.L. DISEASE- EA EMPLOYEE E.L. DISEASE - POLICY LIMIT	 $ $ $

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

CERTIFICATE HOLDER

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

Marc Maillet

ACORD

CERTIFICATE OF LIABILITY INSURANCE

AHB
R045

DATE (MM/DD/YYYY)
5/20/2016

THIS CERTIFICATEIS 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	CONTACT NAME:	
SIHLE INSURANCE GROUP INC/PHS 225280 P:(866) 467-8730 F:(888) 443-6112 PO BOX 29611 CHARLOTTE NC 28229	PHONE (A/C, No, Ext): (866) 467-8730	FAX (A/C, No): (888) 443-6112
	E-MAIL ADDRESS:	
	INSURER(S) AFFORDING COVERAGE	NAIC#
	INSURER A: Twin City Fire Insurance Company	29424
INSURED	INSURER B:	
	INSURER C:	
STARBOARD CONSULTING LLC 2170 W STATE ROAD 434 STE 124 LONGWOOD FL 32779	INSURER D:	
	INSURER E:	
	INSURER F:	

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 INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
	COMMERCIAL GENERAL LIABILITY						EACH OCCURRENCE	$
	☐ CLAIMS-MADE ☐ OCCUR						DAMAGE TO RENTED PREMISES (Ea occurrence)	$
							MED EXP (Any one person)	$
							PERSONAL & ADV INJURY	$
	GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE	$
	☐ POLICY ☐ PRO-JECT ☐ LOC						PRODUCTS - COMP/OP AGG	$
	☐ OTHER:							$
	AUTOMOBILE LIABILITY						COMBINED SINGLE LIMIT (Ea accident)	$
	☐ ANY AUTO						BODILY INJURY (Per person)	$
	☐ OWNED AUTOS ONLY ☐ SCHEDULED AUTOS						BODILY INJURY (Per accident)	$
	☐ HIRED AUTOS ONLY ☐ NON-OWNED AUTOS ONLY						PROPERTY DAMAGE (Per accident)	$
								$
	☐ UMBRELLA LIAB ☐ OCCUR						EACH OCCURRENCE	$
	☐ EXCESS LIAB ☐ CLAIMS-MADE						AGGREGATE	$
	☐ DED ☐ RETENTION $							$
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? Y/N ☐ (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	N/A		21 WEC ZT2633	07/09/2015	07/09/2016	X PER STATUTE ☐ OTH-ER	
							E.L. EACH ACCIDENT	$1,000,000
							E.L. DISEASE- EA EMPLOYEE	$1,000,000
							E.L. DISEASE - POLICY LIMIT	$1,000,000

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

CERTIFICATE HOLDER

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

Marc Maillet

State of Florida
Department of State

I certify from the records of this office that STARBOARD CONSULTING, LLC is a limited liability company organized under the laws of the State of Florida, filed on June 8, 2007.

The document number of this limited liability company is L07000060552.

I further certify that said limited liability company has paid all fees due this office through December 31, 2017, that its most recent annual report was filed on February 11, 2017, and that its status is active.

Given under my hand and the Great Seal of the State of Florida at Tallahassee, the Capital, this the Twenty-fourth day of April, 2017

Ken Detzner

Secretary of State

Tracking Number: CU5314104983

To authenticate this certificate,visit the following site,enter this number, and then follow the instructions displayed.

https://services.sunbiz.org/Filings/CertificateOfStatus/CertificateAuthentication