

## BID COVER



Procurement Division

(352) 334-5021(main)

Issue Date: July 20, 2023

## REQUEST FOR PROPOSAL: #RTSX-230065-DS

### Maintenance Management System for Transit (Rebid)

PRE-PROPOSAL MEETING:  Non-Mandatory  Mandatory  N/A  Includes Site Visit  
 DATE: TIME:  
 LOCATION:

QUESTION SUBMITTAL DUE DATE: **August 4, 2023**

*All meetings and submittal deadlines are Eastern Time (ET).*

**DUE DATE FOR UPLOADING PROPOSAL: August 21, 2023, 3:00pm**

#### SUMMARY OF SCOPE OF WORK:

Maintenance Management System for use by Regional Transit System. Implementation, Training, Go Live, and System Acceptance need to all be completed by no later than June 30, 2024.

For questions relating to this solicitation, contact: [Daphyne Sesco, Procurement Specialist 3, sescoda@gainesvillefl.gov](mailto:Daphyne.Sesco@cityofgainesvillefl.gov)

Bidder is not in arrears to City upon any debt, fee, tax or contract:  Bidder is NOT in arrears  Bidder IS in arrears  
 Bidder is not a defaulter, as surety or otherwise, upon any obligation to City:  Bidder is NOT in default  Bidder IS in default

Bidders who receive this bid from sources other than City of Gainesville Procurement Division or DemandStar.com MUST contact the Procurement Division prior to the due date to ensure any addenda are received in order to submit a responsible and responsive offer. Uploading an incomplete document may deem the offer non-responsive, causing rejection.

**ADDENDA ACKNOWLEDGMENT:** Prior to submitting my offer, I have verified that all addenda issued to date are considered as part of my offer: Addenda received (list all) # Addendum 1, Addendum 2

Legal Name of Bidder: PSD Citywide (US) Inc.

DBA: \_\_\_\_\_

Authorized Representative Name/Title: Daniel Gray

E-mail Address: dgray@psdcitywide.com FEIN: \_\_\_\_\_

Street Address: 4830 West Kennedy Blvd., Suite 600, Tampa, Florida, 33609

Mailing Address (if different): \_\_\_\_\_

Telephone: (656) 656-206-0012 x704 Fax: (\_\_\_\_\_) \_\_\_\_\_

By signing this form, I acknowledge I have read and understand, and my business complies with all General Conditions and requirements set forth herein; and,

- Proposal is in full compliance with the Specifications.  
 Proposal is in full compliance with the Specifications except as specifically stated and attached hereto.

SIGNATURE OF AUTHORIZED REPRESENTATIVE: Daniel Gray

SIGNER'S PRINTED NAME: Daniel Gray DATE: 21 August 2023

*This page must be completed and uploaded to DemandStar.com with your Submittal.*



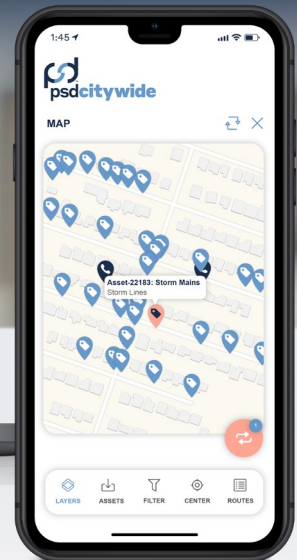
# City of Gainesville

## Maintenance Management System for Transit (Rebid) RFP No. RTSX-230065-DS

### PSD Citywide Response

Contact:  
Name: Dan Gray, Sr. Account Manager  
E-mail: dgray@psdcitywide.com

| Select                   | Asset ID | Asset Category        | Asset Segment          | Sub-Function         | Description        | Historical Cost | Closing Cost | Probability of Failure | Consequence of Failure |
|--------------------------|----------|-----------------------|------------------------|----------------------|--------------------|-----------------|--------------|------------------------|------------------------|
| <input type="checkbox"/> | 35153    | Buildings             | Fleet Transit Building | No Sub-Function      | Main Doors         | \$1,500.00      | \$1,500.00   | 1 - Rare               | 1 - Insignificant      |
| <input type="checkbox"/> | 35152    | Buildings             | Fleet Transit Building | No Sub-Function      | Main Entrance      | \$7,000.00      | \$7,000.00   | 2 - Unlikely           | 1 - Insignificant      |
| <input type="checkbox"/> | 35151    | Buildings             | Fleet Transit Building | No Sub-Function      | Argon Gas          | \$30,000.00     | \$30,000.00  | 1 - Rare               | 2 - Minor              |
| <input type="checkbox"/> | 35150    | Buildings             | Fleet Transit Building | No Sub-Function      | Deionized Block    | \$25,000.00     | \$25,000.00  | 1 - Rare               | 1 - Insignificant      |
| <input type="checkbox"/> | 35149    | Buildings             | Fleet Transit Building | No Sub-Function      | Metal Clad         | \$180,000.00    | \$180,000.00 | 1 - Rare               | 4 - Major              |
| <input type="checkbox"/> | 35148    | Machinery & Equipment | Fire                   | 0410 - Fire          |                    | \$6,512.64      | \$6,512.64   | 2 - Unlikely           | 1 - Insignificant      |
| <input type="checkbox"/> | 35147    | Machinery & Equipment | Fire                   | 0410 - Fire          |                    | \$13,920.77     | \$13,920.77  | 2 - Unlikely           | 1 - Insignificant      |
| <input type="checkbox"/> | 35146    | Machinery & Equipment | Fire                   | 0410 - Fire          |                    | \$22,759.65     | \$22,759.65  | 2 - Unlikely           | 1 - Insignificant      |
| <input type="checkbox"/> | 35145    | Roads                 | Collector - Base       | No Sub-Function      | Road Base          | \$230,000.00    | \$230,000.00 | 1 - Rare               | 3 - Moderate           |
| <input type="checkbox"/> | 35144    | Roads                 | Surface                | 0611 - Roads - Paved | Road Surface       | \$130,000.00    | \$130,000.00 | 2 - Unlikely           | 3 - Moderate           |
| <input type="checkbox"/> | 35143    | Land                  | Right of Way           | No Sub-Function      | Irregular          | \$13,824.00     | \$13,824.00  | 1 - Rare               | 3 - Moderate           |
| <input type="checkbox"/> | 35142    | Land                  | Right of Way           | No Sub-Function      |                    | \$12,848.00     | \$12,848.00  | 1 - Rare               | 3 - Moderate           |
| <input type="checkbox"/> | 35141    | Land                  | VL                     | General Government   | Plan 853 Lot 811   | \$1,065.00      | \$1,065.00   | 1 - Rare               | 1 - Insignificant      |
| <input type="checkbox"/> | 35140    | Land                  | VL                     | No Sub-Function      | Plan 853 Lot 841   | \$437.00        | \$437.00     | 1 - Rare               | 1 - Insignificant      |
| <input type="checkbox"/> | 35139    | Sanitary System       | Sewer Lines            | No Sub-Function      |                    | \$5,127.00      | \$5,127.00   | 2 - Unlikely           | 2 - Minor              |
| <input type="checkbox"/> | 35138    | Sanitary System       | Sewer Lines            | No Sub-Function      |                    | \$3,319.00      | \$3,319.00   | 1 - Rare               | 2 - Minor              |
| <input type="checkbox"/> | 35137    | Sanitary System       | Sewer Lines            | No Sub-Function      |                    | \$2,488.00      | \$2,488.00   | 1 - Rare               | 2 - Minor              |
| <input type="checkbox"/> | 35136    | Sanitary System       | Sewer Lines            | No Sub-Function      |                    | \$3,309.00      | \$3,309.00   | 1 - Rare               | 2 - Minor              |
| <input type="checkbox"/> | 35135    | Sanitary System       | Sewer Lines            | No Sub-Function      |                    | \$5,024.00      | \$5,024.00   | 1 - Rare               | 2 - Minor              |
| <input type="checkbox"/> | 35134    | Storm System          | Catch Basin            | No Sub-Function      | Single Catch basin | \$915.00        | \$915.00     | 3 - Possible           | 1 - Insignificant      |
| <input type="checkbox"/> | 35133    | Storm System          | Catch Basin            | No Sub-Function      | Double Catch basin | \$2,861.00      | \$2,861.00   | 2 - Unlikely           | 1 - Insignificant      |
| <input type="checkbox"/> | 35132    | Storm System          | Catch Basin            | No Sub-Function      | Single Catch basin | \$1,560.00      | \$1,560.00   | 3 - Possible           | 1 - Insignificant      |



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# Cover Letter

August 21, 2023  
City of Gainesville  
200 E University Ave Gainesville, FL 32601.

To Daphyne SESCO:

On behalf of PSD Citywide (US) Inc., I am pleased to submit to the City of Gainesville (herein known as the "City") our response to your organization's Request for Proposal #RTSX-230065-DS for a **Maintenance Management System for Transit** (Rebid). PSD Citywide (US) is a privately held firm and leading software application provider that focuses on providing enterprise asset management and budgeting research, consulting, and software to municipalities and other government agencies. From our local service office in Tampa, Florida, and head office in London, Ontario, we have been enhancing public sector practices since 2003.

The City is seeking proposals from vendors that supply Maintenance Management software for the day-to-day operations of the RTS Maintenance Department. The City requires that the software solution is easy-to-use, compatible with their current fuel management system (Fleetwatch), and can convert their current asset management and inspection data. The implementation engagement requires both training and support.

PSD Citywide (US) has strived to ensure that the content of this proposal achieves the City's goals by delivering a project that will result in an upgrade of the organizations current system so they are able to manage assets, operations, and maintenance, and support the long-term sustainability of the RTS. We have also endeavored to ensure this proposal is complete, accurate, and representative of our abilities.

On behalf of PSD Citywide (US), thank you for the opportunity to provide our proposal, and we look forward to discussing our services and capacity with you in greater detail.

PSD Citywide (US)'s authorized agent designated to discuss and possibly negotiate elements contained within the response is Daniel Gray, Sr. Account Management m: (656) 206-0012 x 704 e: [dgray@psdcitywide.com](mailto:dgray@psdcitywide.com).

*Matthew Dawe*  
Matthew Dawe, Vice-President  
PSD Citywide (US) Inc.



# Executive Summary

PSD Citywide is proposing our enterprise suite cloud-based software applications – Citywide Software – a Enterprise Asset Management (EAM) system with robust Maintenance Management capabilities. Our solution will provide the City with an easy-to-use Maintenance Management solution that offers comprehensive functionality without significant capital investment in IT infrastructure and complex tools and integrations.

## Overview of Products and Services

### Software Services

Citywide Software consists of a full suite of enterprise tools for asset management, budgeting, and GIS. All Citywide modules are hosted, developed, and supported by PSD Citywide. Our enterprise-wide pricing model eliminates the traditional per-seat licensing model employed by legacy software providers. Complex concepts and decision-making scenarios are presented in real time and summarized in graphical format for greatly improved communication. Our applications are web-hosted and require no additional third-party licenses, no additional onsite equipment, space, electrical, or onsite technical support staff.

### Citywide Software Platform

Citywide Enterprise Asset Management (EAM) is a suite of modules that support, enhance, and streamline asset management and maintenance management for public sector organizations. Citywide will act as a central and consolidated data repository for all asset classes, including transit vehicles and maintenance equipment.

The proposed modules of our enterprise solution include:

- 1) Citywide Maintenance Manager** is our CMMS solution, which will serve as the City's work order management system. Citywide offers service request, work order, inspection, and preventative maintenance functionality, and calculates resources utilized, inventory consumed, vendor costs, as well as direct and indirect labor costs for each department. In addition, clients can track the status of all work in progress, schedule resources, and manage parts and material inventories.
- 2) Citywide Asset Manager** provides users with a complete asset inventory for all linear and non-linear asset types. Key features of the module include leveraging condition, lifecycle, and risk to optimize capital planning and justify a proactive approach to maintaining utility assets.
- 3) Mobile Field Application** is available on iOS or Android app stores. Field staff have access to complete asset information, improving efficiency and performance in asset management. Staff can input the results of visual assessments, attach photos, and enrich asset attribute data. Maintenance staff can access assigned work orders, inspections, and preventative maintenance events. The integration with ArcGIS allows staff to view their assets and work activities through a map view or through a list view. Offline mode is available as a standard, allowing users to work offline and sync data when internet connection is available.

# Company Information

PSD Citywide is a privately held firm that is incorporated in the United States and Canada. The company was established in 2003 and we are incorporated in the state of Delaware. We are licensed in the states of California, Florida, and Texas. Since 2016, our focus has been on providing world-class enterprise permitting and licensing, land management, asset management, maintenance management and budgeting software and advisory services to the public sector. With a multi-disciplinary advisory team and a leading in-house software development team, PSD Citywide provides complete solutions to deliver best-in-class service for our public sector clients. Our client base is geographically and demographically diverse and includes hundreds of small, mid-sized, and large local governments.

Our team is comprised of experienced engineers, accountants, technical specialists, analysts, former senior municipal managers, GIS and operations specialists, and software developers. To ensure client programs adhere to leading standards, our advisors and analysts are certified through the Institute of Asset Management (IAM) and are well-versed in industry best practices including ISO 55000. We have helped clients build sustainable and strategic practices that encompass all asset classes including roads, bridges, water, wastewater, storm, civic facilities, fleet, IT, among other classes.

PSD Citywide has also implemented over 500 software systems for public sector organizations to date which are collectively used to manage over \$300B in assets. Our full suite of Enterprise Asset Management (EAM) software applications includes Citywide Asset Manager with GIS Viewer and Decision Support functionality, Citywide Maintenance Manager with an add-on Citizen Request Portal, and Citywide Permits. Citywide Enterprise GIS (EGIS) is a fully managed desktop, web, server, and mobile GIS solution for government organizations. Finally, Citywide Enterprise Budgeting (CEB) provides a solution for operating, capital, and salary planning and financial reporting. We provide full project management services throughout each implementation, including initiation, setup, data migration, configuration, training, support during go-live, and post-implementation support for all systems.

PSD Citywide Inc. has some flexibility with how and where we deploy our applications and how we handle disaster recovery. Citywide leverages cloud computing platforms from both Digital Ocean (DO) and Amazon (AWS). Depending on the instance, a client's primary data center and secondary disaster recovery (DR)/backup location can be located in New York, Ohio, Virginia, Oregon, and/or California. Clients always have access to their data at any time without restrictions.

The result of our products, team, and extensive experience is a fully integrated service that is the only complete solution in the market for building mature, manageable asset and maintenance management, and budgeting programs for public sector organizations.

PSD Citywide currently employs over 120 staff members and has 6 offices located across North America including 3 in the United States and 3 in Canada.

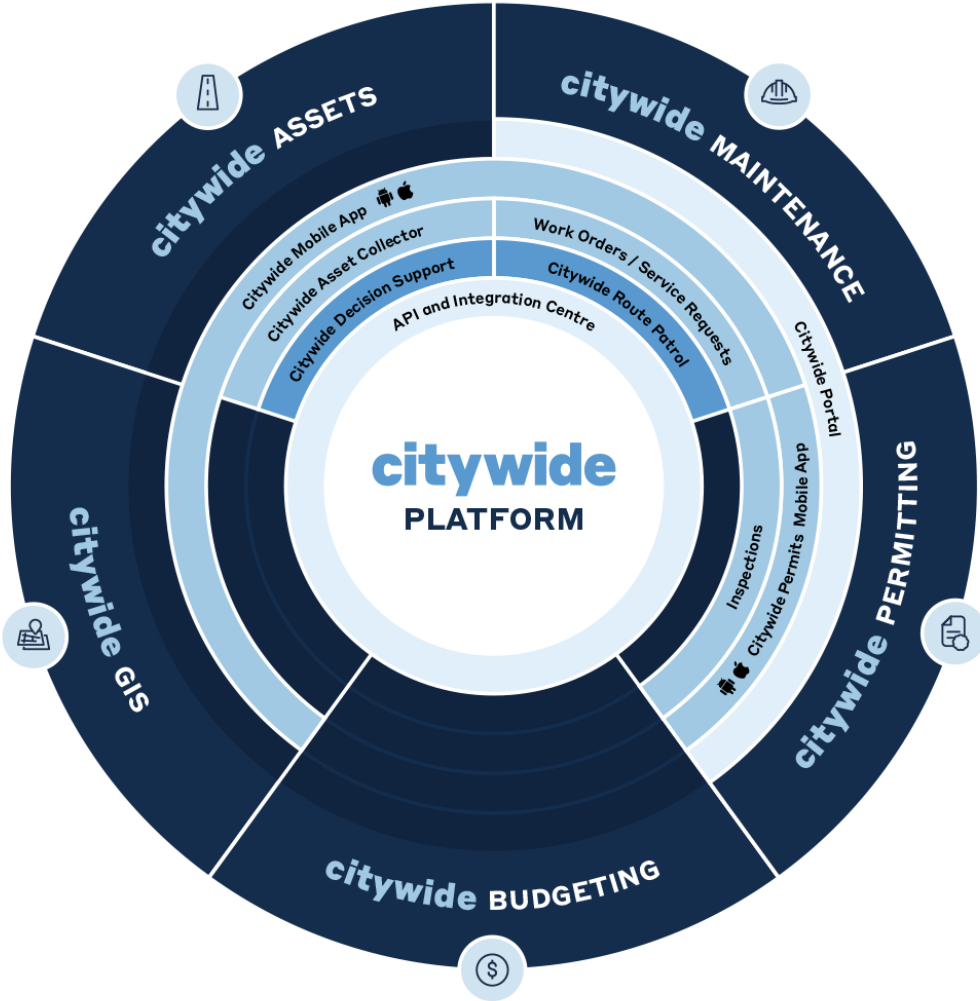
# Product Information

Name and version number of product being proposed.

Citywide Software Version 4.

Product modules including any add-on or optional modules.

Below is a diagram of our Citywide Platform, which indicates all the available modules and how they interact with each other. This diagram contains all the additional/optional add-ons.



## History Of Product Versions and Releases In The Past 5 Years.

PSD Citywide is dedicated to regular version releases and ongoing system updates. Embracing the dynamic landscape of technology, we strive to enhance user experiences and elevate performance benchmarks. Our agile development approach ensures that our clients are consistently empowered with the latest features, security enhancements, and optimizations. By fostering a culture of continuous improvement, we not only respond to evolving market demands but also anticipate the needs of our users, delivering a seamless and progressive software ecosystem that remains at the cutting edge of functionality and reliability.

## Support Services (Post Go-live):

Our Software Support Team is well-equipped to resolve technical difficulties experienced by the City throughout the duration of the contract and will be happy to engage with City staff directly throughout the troubleshooting process. Support is provided out of our London or Burlington, Ontario offices, and is available from 8:30am to 5:00pm EST, Monday through Friday (excluding statutory holidays) though we will always return your call/email on the same day and will usually resolve any problem within 24 hours.

We provide the following direct support options:

- Telephone support is available from 8:30am to 5:00pm EST, Monday through Friday via the PSD Citywide telephone number at +1 (519) 690-2565.
- E-mail support is available from 8:30am to 5:00pm EST, Monday through Friday via the PSD Citywide support email at support@psdcitywide.com.
- Should the City require additional support beyond the above options or outside of specified business hours, this can be facilitated through the City's Account Manager and their team of Client Support Representatives.

## Citywide Support Centre

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

## Ongoing Maintenance and Support Services

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

Clients are entitled to receive all new versions and upgrades of Citywide Software free of charge. Clients are also entitled to receive service packs issued promptly to fix problems reported by customers and deliver minor functionality and performance improvements.

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

## Ensuring Product Scalability and Sustainability:

Citywide software is an extremely user-friendly, flexible, and scalable solution that requires no programming or technical experience. Because Citywide uses an enterprise license, the City will be able to expand the use of Citywide to all future departments and can upload larger quantities

of data as the need arises. Data storage capacity is unlimited, and there are no extra costs for out of the box data storage. The City can also provide full access to an unlimited simultaneous number of users and roles and can scale the number and types of users up or down as required.

It is important to note that our team will train the City to ensure that staff have the knowledge to add new workflows and processes into the system on their own. Authorized City users will be fully capable of adding new workflows and processes without the need to request for PSD Citywide's help. Citywide is extremely user-friendly and will allow the City to scale its database as required.

# Technical Proposal

To meet the City's key objectives, PSD Citywide proposes Citywide Software; an **Enterprise Asset Management (EAM)** system comprised of a suite of web-based software applications that support, enhance, and streamline asset management for public sector organizations. Our suite of modules includes tools for maintenance management, asset management, and GIS. The modules within the EAM will automatically communicate with each other, making sure there is always an accurate view of each asset. Our applications are web-hosted and require no additional third-party licenses, no additional onsite equipment, space, electrical, or onsite technical support staff.

## Project Understanding

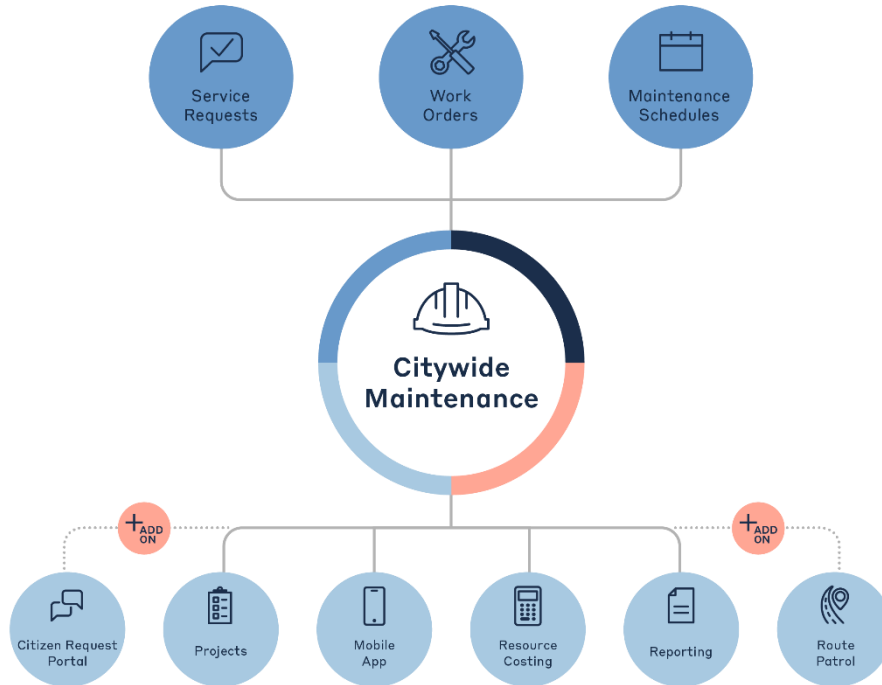
The City is seeking proposals from vendors that supply Maintenance Management software for the day-to-day operations of the RTS Maintenance Department. The City requires that the software solution is easy-to-use, compatible with their current fuel management system (Fleetwatch), Clever Devices, and can convert their current asset management and inspection data. The implementation engagement requires both training and support.

## Proposed Citywide Software Solution

To achieve the City's objectives, we propose supplying and implementing our Citywide Software, which will hereon be referred to as Citywide. Both asset and maintenance management capabilities are provided within our single Citywide platform through two core integrated modules, which are the **Citywide Asset Manager** module and **Citywide Maintenance Manager** module.

Citywide is a true enterprise solution as all modules within the Citywide Platform integrate with each other and were designed from the ground up to work with one another creating a central repository of information. Our applications are web-hosted and require no additional third-party licenses, no additional onsite equipment, space, electrical, or on-site technical support staff. Citywide clients also enjoy immediate access to all updates, new features, data backups and approved software enhancements. Our enterprise-wide pricing model eliminates the traditional per-seat licensing model employed by legacy software providers, providing the Counties with an unlimited user platform that provides the best possible value.

# Citywide Maintenance Manager



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

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

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

Maintenance Manager is a cloud-hosted solution that is fully integrated with the full suite of Citywide enterprise tools for asset management, GIS, and permits management, which are also hosted, developed, and supported by PSD Citywide.

Currently, we have 4000+ users using the Citywide Maintenance Manager module, with 38,000+ digital service requests created and 150,000+ work orders issued annually.

## Key Features and Benefits



### Service Requests and Work Orders

Track service requests, generate and assign work orders.



### Resource Calculation

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



### Accurate and Data-Rich Reporting

Make informed decisions with built-in reports.



### Maintenance Schedules

Add maintenance schedules triggered by time & asset usage.



### Mobile Functionality

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



### Project Tracking

Track progress and budget for capital or infrastructure projects.



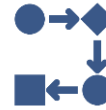
### Inspections and Compliance Monitoring

Classify & customize work orders to track compliance inspections.



### Full GIS Capabilities

View all available information related to components on the map.



### Workflow Process Control

Customize workflows based on your SOPs.



### Email Notifications

Notifications about key activities and work orders status.



### Citywide Hub

Embed an online portal that anyone can use into the community website.



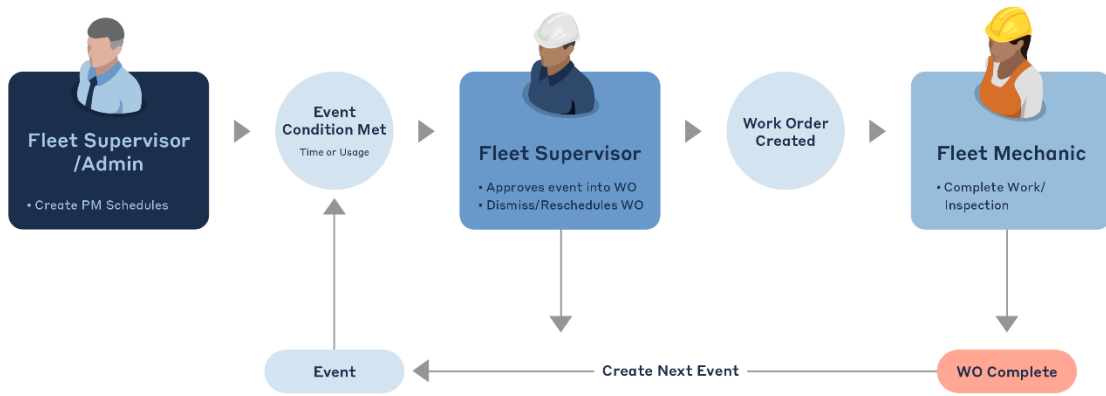
### API

Application Programming Interface to integrate with other software.



Example Workflow within Citywide Maintenance Manager

### Preventative Maintenance Workflow



## Citywide Asset Manager

Citywide Asset Manager is an enterprise asset management solution and asset register that supports all asset classes. Designed to align with industry standards and incorporate core asset management functions, Citywide Asset Manager serves as one central database for all assets, providing users with a single corporate-wide source for asset information.

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

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

### Key Features and Benefits



#### Attributes

Develop unlimited asset attributes to create multiple scenarios.



#### Risk Modeling

Unlimited risk classes, metrics, and weightings.



#### Lifecycle Monitoring

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



#### Reporting

Create and save reports to share across the organization.



#### GIS and Mapping

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



#### Asset Collector

Field staff can download and visualize assets in the field.

## Technical Requirements

### Application and Integration Requirements

#### System Integration Overview

Citywide allows for integration with other software systems to provide functionality across platforms without the need for double entry. Integration effort can range from low to high according to the complexity of the tasks required and according to the medium selected to perform the integration, such as data dumps being passed back and forth, direct database

connections, or API calls. Typically, integration requirements can be handled using the proposed Citywide solution's import/export functionality or Citywide's API:

- **Import/Export:** In our experience integrating with a wide variety of software systems, each system integration can usually be handled through the import and export functionality of Citywide with no additional integration cost. Typical integrations take three to four weeks to complete.
- **Citywide API:** If it is determined that completing more complex integrations between systems is a requirement of the project, the Citywide system does not need to be configured further, users will simply establish a connection with use of the API, which is provided by PSD Citywide.

The integration process itself relies on choosing a unique identifier or "primary key" that facilitates one-to-one mapping of data, or endpoints, between the two systems being integrated. From there, PSD Citywide determines the medium as well as the strategy for performing the specific integration (something manually triggered by a button push, scheduled task, live links/triggers, etc.) Based on the client organization's requirements, there may be need for a review / approval phase during data syncs to help consolidate conflicts between the two systems, which may require manual intervention or a set of predetermined rules for conflict handling. We will support clients with system analysis, staff interviews, and workshops as required to find effective solutions to meet their needs.

We have provided successful integration support for clients with leading GIS, fuel management, and payroll systems with our Asset Manager, GIS, and Maintenance Manager. With Citywide Enterprise Budgeting, we have accumulated experience supporting hundreds of integrations with financial software for municipalities of varying sizes.

Overall, we have supported more than 160 clients with integrations with third-party systems, including the following:

### **Typical API Client Integrations**

Each integration support is contingent upon a collaboration with PSD Citywide staff, and the client to determine data requirements, specifications required for integration, and contact with the software integration vendor if/when required.

To provide support to our clients, we have made available full API documents that provide a foundation for the client to integrate with their system vendors. If PSD Citywide needs to expose more data for successful integration, we will work with client's vendor to determine how that data needs to be exposed.

### **Citywide API for Asset Manager**

Citywide comes with out-of-the box API documentation that allows authorized sources to extract data, automate tasks, or integrate with third-party systems. Citywide's external API is a RESTful web service that can be accessed by bearers of a valid API key. Arguments are provided as GET (query) and POST parameters and data is formatted as JSON.

Citywide's external API is accessed via the HTTPS protocol, implementing standard URL structuring and HTTP verbs to allow data to be retrieved or written. Attempts made over HTTP will be met with a 301 redirect status code. Requests are made to a specific URL/endpoint relating to the resource being interacted with, plus related parameters.

All API requests must have the following 3 query parameters:

`client_db`: a string containing your short-form client name (used during login) and schema (database instance) code\* separated by a period, eg. `cityname.main`

`username`: a string containing the name of the user related to the `api_key` parameter

1. `api_key`: the api key related to the user accessing the resource

General Example:

```
.../endpoint/1?client_db=cityname.main&username=apiuser&api_key=a1b2c3...
```

Assets Example:

Read and write AM Asset data.

Endpoint:

[https://v4.citywidesolutions.com/v4\\_server/external/assets/](https://v4.citywidesolutions.com/v4_server/external/assets/)

Returned Data Key: "Assets"

Supported Verbs:

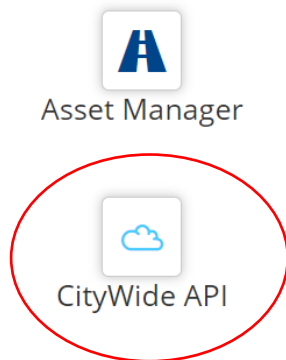
- GET /
- GET /id
- PUT /id
- PATCH

Returned Fields

- *classifications*: object - key-value pair for asset classifications like `{"Category": "Roads", ...}`
- *condition*: float - best-available condition value, relative to database's reporting year, according to related profile's condition settings
- *condition\_assessment\_date*: string - date of last condition assessment, or "Age-based" if none present
- *condition\_ratio*: float - asset's condition expressed as a ratio between 0 and 1

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

Client staff can log in to their system at [https://v4.citywidesolutions.com/v4\\_client/](https://v4.citywidesolutions.com/v4_client/) in order to access the API and find downloadable test and example code packages used to verify connectivity to Citywide's external API, and perform sample requests to the API's endpoints.



## Test and Example Code Packages

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

### Basic Package

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

[Click to Download Package](#)



Downloads > api\_basic\_examples > api\_basic\_examples

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

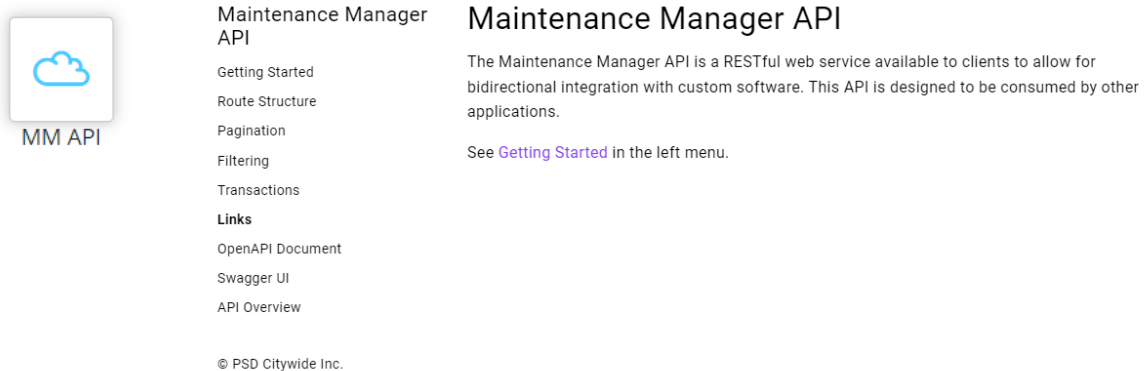
### Citywide API for Maintenance Manager

Citywide comes with out-of-the box API documentation for Maintenance Manager that allows authorized sources to extract data, automate tasks, or integrate with third-party systems using API endpoints. Citywide's external API is a RESTful web service that can be accessed by bearers of a valid API key. Arguments are provided as GET (query), PUT, and POST parameters and data is formatted as JSON.

Citywide's external API is accessed via the HTTPS protocol, implementing standard URL structuring and HTTP verbs (GET, PUT, POST) to allow data to be retrieved, updated, or written. Attempts made over HTTP will be met with a 301 redirect status code. Requests are made to a specific URL/endpoint relating to the resource being interacted with, plus related parameters.

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

Client staff can log in to their system at [https://v4.citywidesolutions.com/v4\\_client/](https://v4.citywidesolutions.com/v4_client/) to access the API and have access to the API documentation and test application. To access the MM API, click the MM API icon in the Help & Support section of your Home screen. The Maintenance Manager API screen appears. From this screen, users can access the API documentation.



**Maintenance Manager API**

- Getting Started
- Route Structure
- Pagination
- Filtering
- Transactions

**Links**

- OpenAPI Document
- Swagger UI
- API Overview

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## Maintenance Manager API

The Maintenance Manager API is a RESTful web service available to clients to allow for bidirectional integration with custom software. This API is designed to be consumed by other applications.

See [Getting Started](#) in the left menu.

All API requests must have the following three query parameters to authenticate a user of the system.

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

General Example:

```
POST /authenticate
Content-Type: application/json

{
  "api_key": "<api key>",
  "client_db": "<client db>",
  "username": "<user name>"
}
```

Sample Work Order API Calls

Users can List, Read, Create, Update, and Delete Maintenance Manager Work Orders. See the following examples:

| Task   | Sample JSON API Call  |
|--|---|
| To get (list) a list of all records, use GET.  | GET /maintenance/work_orders  |
| To retrieve (read) a specific a specific work order, use GET with the work order number. | GET /maintenance/work_orders/12345  |
| To create a new work order, use POST with the required parameters of the work order.     | POST /maintenance/work_orders<br>Content-Type: application/json<br><pre>{   "department_id" : 1,   "work_order_type_id" : 2,   "work_order_type_group_id" ; 3 }</pre> |
| To update a work order, use PATCH or POST with the parameter(s) that requires changing.  | PATCH /maintenance/work_orders/12345<br><pre>{   "priority" : 3 }</pre>   |
| To delete a work order, use DELETE with the work order number.                           | DELETE /maintenance/work_orders/12345   |
| To retrieve a list of work orders attached to a service request, use GET.                | GET /maintenance/service_requests/{id}/work_orders  |

PSD Citywide provides the Swagger UI for users to review and interact with the Maintenance Manager API without the need for implementation logic. It is automatically opened from the Maintenance Manager OpenAPI specification displaying visual documentation making it easy for back-end implementation and client-side consumption.

Click the **Swagger UI** link to open the Maintenance Manager source.

Maintenance Manager API

[Getting Started](#)  
[Route Structure](#)  
[Pagination](#)  
[Filtering](#)  
[Transactions](#)

**Links**

[OpenAPI Document](#)

[Swagger UI](#)

| User   |   |   |
|--------|---|---|
| GET    | /maintenance/resources/crews  | 🔒 |
| GET    | /maintenance/resources/service_request_types/{service_request_type_id}/responsible      | 🔒 |
| GET    | /maintenance/resources/service_request_types/{service_request_type_id}/responsible/{id} | 🔒 |
| GET    | /users  | 🔒 |
| POST   | /users  | 🔒 |
| GET    | /users/{id}   | 🔒 |
| PATCH  | /users/{id}   | 🔒 |
| DELETE | /users/{id}   | 🔒 |

The user can review and test all parameters and responses available for the JSON file format.

Click **API Overview** to download a copy of the Maintenance Manager API Overview PFD for reference.

Maintenance Manager  
API

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API Overview



## Maintenance Manager API Overview

Overview of endpoints available via the Maintenance Manager API and their supported verbs.

For full documentation, please see <https://docs.citywidesolutions.com/mm/v1/guide/>.

[Application](#)  
[Area](#)  
[Asset](#)  
[Attached File](#)  
[Attribute](#)  
[Authentication](#)  
[Check-in](#)  
[Checkin](#)  
[Classification](#)

[Community](#)  
[Contact](#)  
[Cost](#)  
[Crew](#)  
[Customer](#)  
[Department](#)  
[Equipment](#)  
[General Ledger Code](#)  
[Note](#)

[Part/Material](#)  
[Property](#)  
[Property Use](#)  
[Property Zone](#)  
[Resource](#)  
[Role](#)  
[Service Request](#)  
[Service Request Type](#)  
[Source Type](#)

[Timesheet](#)  
[Transaction](#)  
[User](#)  
[Work Order](#)  
[Work Order Status](#)  
[Work Order Type](#)  
[Work/Activity Code](#)  
[Worker](#)

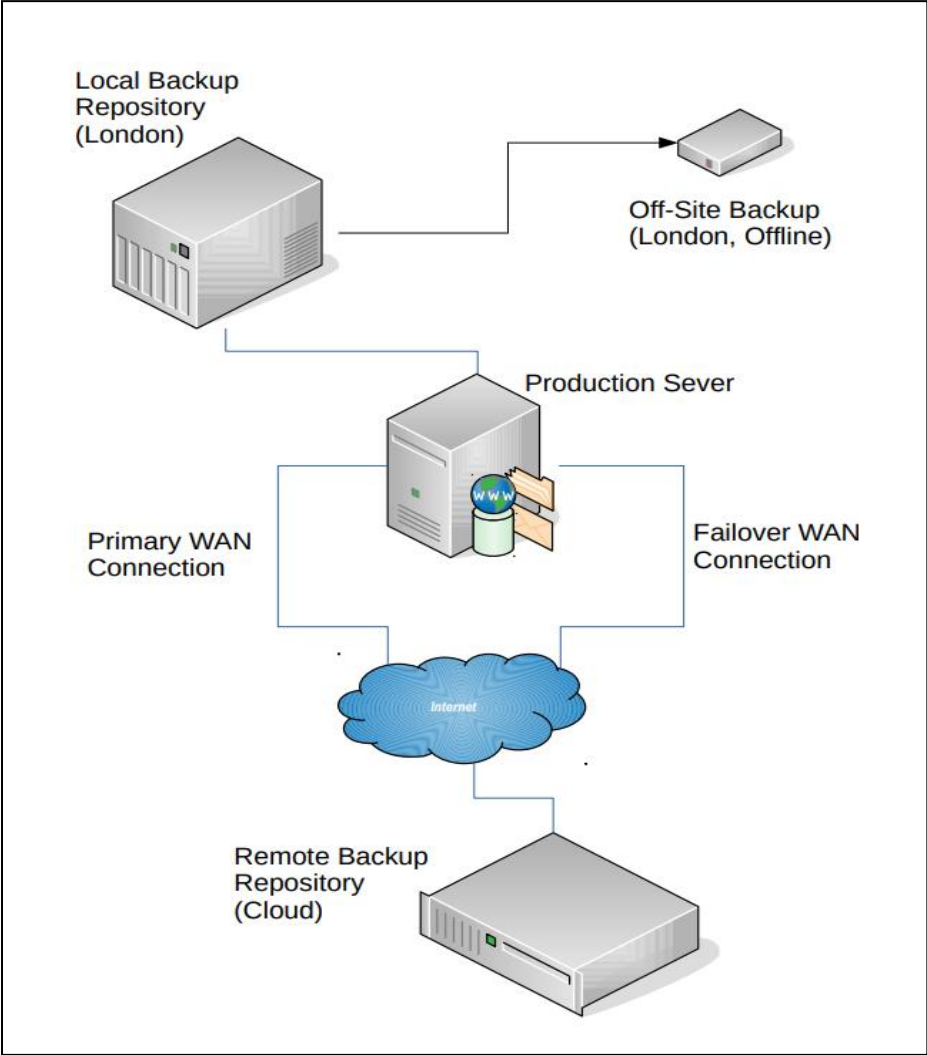
© PSD Citywide Inc.

## Software Solution Technical Details

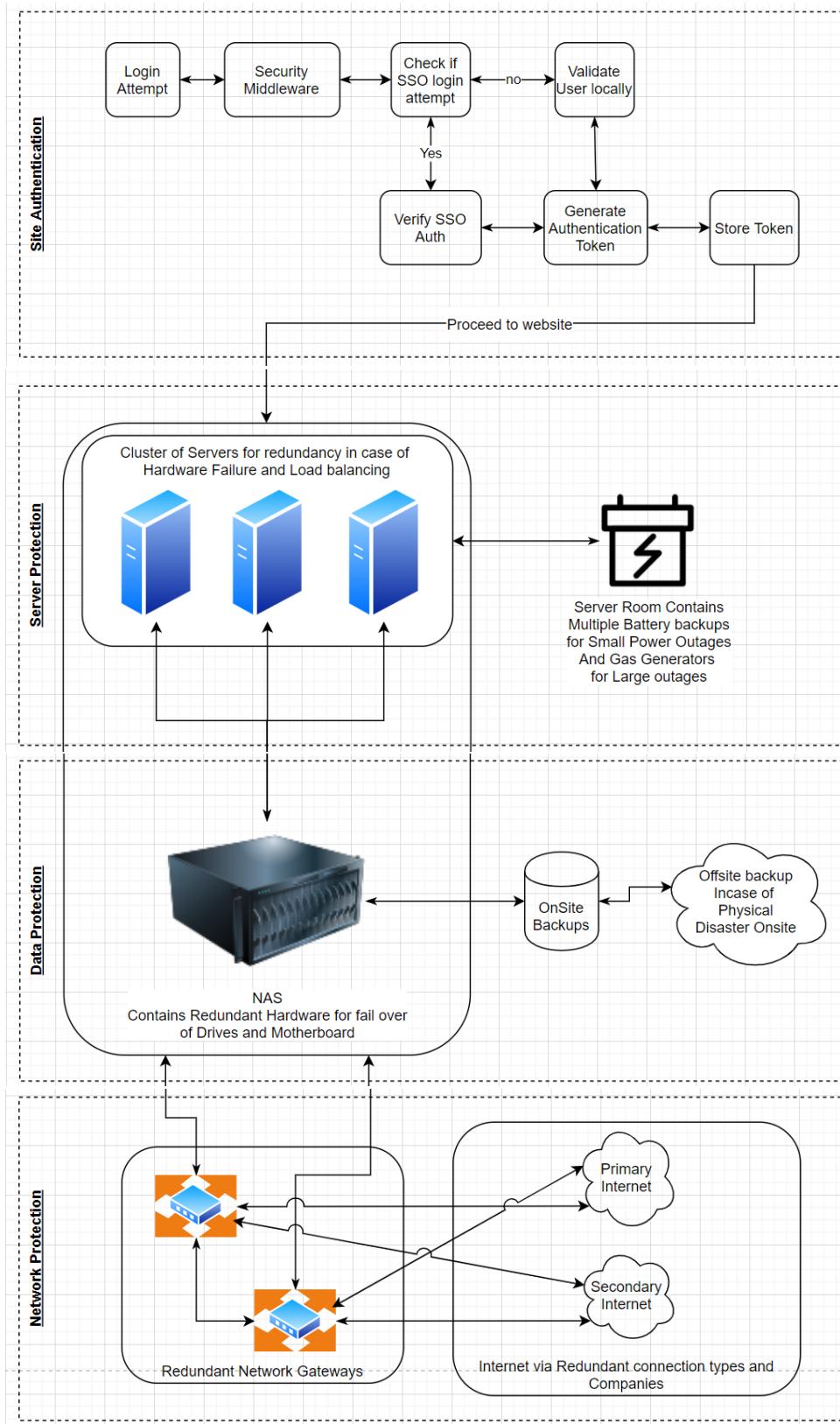
Citywide is a modern, web-based, SaaS solution. All Citywide Software applications are hosted, enterprise-wide programs that require no additional third-party licenses, no additional onsite equipment, space, electrical, or onsite technical support staff. PSD Citywide performs nightly backups of the entire client's database. PSD Citywide is responsible for, and manages the hardware, software and data associated with all our Citywide Software applications. Planned system maintenance is communicated via the Citywide login portal, in the News section. Scheduled downtime for system maintenance is scheduled during off-peak hours (typically weekends). The programming language/development tools that we use include Angular/HTML/js/css (User Interface/Presentation Layer), PHP in the server (Business/Application Layer), PostgreSQL (Data Layer), Linux (kernel). Specific core



technologies include Angular, AngularJS, vueJS, OpenLayers 4, Bootstrap, PHP, PostgreSQL, GeoServer and PostGIS.



Below is an expanded site diagram:



## System Requirements and Information



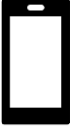
Citywide is a cloud-based SaaS solution. We support all major web browsers, including Chrome, Microsoft Edge, FireFox, and Safari. Our solution achieves sub-second response times and is highly scalable using Docker Swarm. Citywide has 99.99% uptime, which includes planned outages. Typically, planned outages are performed outside of business hours to minimize any impact to clients. As Citywide is a SaaS solution, data models are not exposed. We manage the application layer, hardware, databases and all associated maintenance and upgrades.




### Citywide Solutions Version 4 System Requirements

|                  | Recommended                                     | Minimum  |
|------------------|---|--|
| Browser:         | Google Chrome<br>Firefox<br>Microsoft Edge      | Internet Explorer 11                           |
| Monitor / Screen | Screen resolution of 1920 x 1080 pixels (1080p) | Screen resolution of 1280 x 720 pixels (720p)  |
| Computer         | Intel Core i5-4300 or comparable<br>8GB of RAM  | Intel Core i5-3300 or comparable<br>4GB of RAM |

Recommended Browser: Google Chrome, Firefox, Microsoft Edge

Minimum Browser: Internet Explorer 11 and other options

| Citywide Software IT Requirements   |   |
|---|---|
|  | Our cloud-based, or SaaS model has no physical need for indirect, “middle-man” distribution as it is not distributed physically, nor does it require hardware on the client’s end, and is deployed almost instantaneously, thereby eliminating the need for partners in its implementation and operating. |
|  | Clients access Citywide through any device that has browser capabilities, as users will only require the website address, a username, and a password for system access.   |
|  | Clients can use the mobile application via iOS and/or Android, and all modern phones and tablets can support this application.  |

|   |   |
|---|---|
|  | <p>We support all modern web browser providers, including Safari, Firefox, Microsoft Edge, and Internet Explorer 11+; however, Citywide tools are optimized for use with Google Chrome.</p> |
|  | <p>Use of the software requires broadband internet (minimum 25Mbps download and 3Mbps upload), the same bandwidth to read emails and browse the web.</p>                                    |
|  | <p>There are no bandwidth restrictions on data uploads and downloads, data storage capacity is unlimited, and there are no extra costs for out-of-the-box data storage.</p>                 |

### Hardware Requirements

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

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

Use of the software requires the same bandwidth to read emails and browse the web, with the minimum bandwidth requirement being 1-5 Mbps. Additionally, there are no bandwidth restrictions on data uploads and downloads, data storage capacity is unlimited, and there are no extra costs for out-of-the-box data storage.

### User Friendly Design

We acknowledge that the objective of this project is to have minimal customization using as much “out-of-the-box” configuration as possible. Should PSD Citywide be awarded the contract, we will enter discussion with the Counties to finalize the overarching project plan and additional levels of customization desired by each local government. Throughout these talks, PSD Citywide will highlight and magnify how desired customization is anticipated to impact our support services.

As Citywide software is already highly customizable, any customization that takes place within the parameters of the out-of-the box solution will not impact our listed support services on offer in this proposal.

The Citywide interface is designed to meet best practice design standards, using approved fonts and colors to help users communicate important information to senior management, staff, and citizens. Simple graphics and minimal text make it easy for users to work their way around the software allowing users to find and display the information they need. The user-friendly nature of Citywide software is detailed as follows:

**Simple:** Citywide modules are fully integrated with each other, allowing real-time data updates to flow between applications. The Citywide interface provides users with quick, straightforward access to common features and commands.

**Clean:** The Citywide interface is designed to help you communicate important information to Council, Staff and Citizens. Simple graphics and minimal text make it easy for users to work their way around the software, allowing users to find and display the information they need.

**Intuitive:** With high visual impact and intuitive functionality, even those unfamiliar with Citywide can use the software to perform meaningful analysis with minimal instruction. Quick access to User Guides, Video Tutorials, and Frequently Asked Questions provides immediate support for users seeking assistance with advanced software functionality.

**Reliable:** You can trust the reliability of Citywide Software because PSD Citywide hosts, develops, and supports it. The software is open-source and web-hosted and requires no additional third-party licenses. Citywide users have immediate access to all tested and approved software enhancements and secure redundant data backup. PSD Citywide employs a rigorous testing procedure to ensure the software functions properly and meets internal UX standards before a software update or bug fix is released.

## System Performance

Currently, based on performance, our uptime is %99.99 and we are confident that we are able to maintain this. To protect all data, PSD Citywide keeps a disaster site located outside of the primary hosted systems. PSD Citywide performs nightly backups/recovery points that are stored on and off-site, which allows for the recovery time (RTO) of four hours as these backups typically take half a business day. PSD Citywide's recovery point objective (RPO) is up to 24 hours only because it is our policy to perform nightly backups. The Source Code of the system is also backed up at an offline location in the United States. (NOTE: **No client data is stored outside of Canada**; all client data is stored within Canada, at the London Ontario sites).

## System Security

Citywide has not experienced any security breaches to-date. PSD Citywide uses an Ubiquiti IPS inspecting traffic to our production subnet. To identify any vulnerabilities within our solution, PSD Citywide conducts regular code review as well as periodic testing in the system.

PSD Citywide follows best practices in antivirus, firewall, patches, etc. to ensure the protection of our solution. PSD Citywide conducts regular checks to ensure that there have been no breaches.

Each deployment of Citywide has a unique database which is secured and prevents access to client's database or data from any third-party entities. Activity Logs are available throughout our software which provide tools for the client's IT administrators to monitor changes throughout Citywide. The Cloud tenancy space is restricted to PSD Citywide staff only and we do not provide access to the backend database.

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

We will ensure that all Citywide applications are secure and that there are no breaches in client data or information. We provide prompt notification of any issues with Citywide that impacts confidentiality, integrity, and availability of the data processed or stored on the cloud platform.

### **Encryption**

PSD Citywide encrypts and protects all data traffic, unique user accounts, and security profiles data using HTTPS. Communications between the client and servers are encrypted with TLS. Passwords are stored as salted hashes (SHA-512), never as plain text.

Nightly remote backups are encrypted with AES-256-CBC before transmitting. The services and any components provided utilize security and privacy technologies and protocols that meet industry standards including encryption and protocols including but not limited to 128-bit Secure Socket Layer (SSL), DES-2 or DES-3 encryption and WPA2 (for WiFi communications). If for any reason said technologies or protocols become outdated or vulnerable, PSD Citywide agrees to update said part or component using new security and privacy technologies and protocols that meet the then current industry standards at no additional cost to the client.

### **Access to Client Data and Servers**

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

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

Our servers are physically and environmentally secure. Access to the main building requires an access card, and an additional level of security is then required to access the server room. The server room is monitored 24/7 and includes its own HVAC system and proper offsite store of database backups. With each Citywide deployment, all application business data and backup data will be securely hosted and stored at PSD Citywide's London Ontario location.

### **What happens to Client data once they cease to be a client?**

Each client has a unique database with client-controlled access meaning that the account would never be shared with a new tenant. If the Counties cease to be a client of PSD Citywide, all data is erased and destroyed after returning it to the client.

### **How is data recovery performed? Is a disaster recovery plan in place for your company, documented and available to the City?**

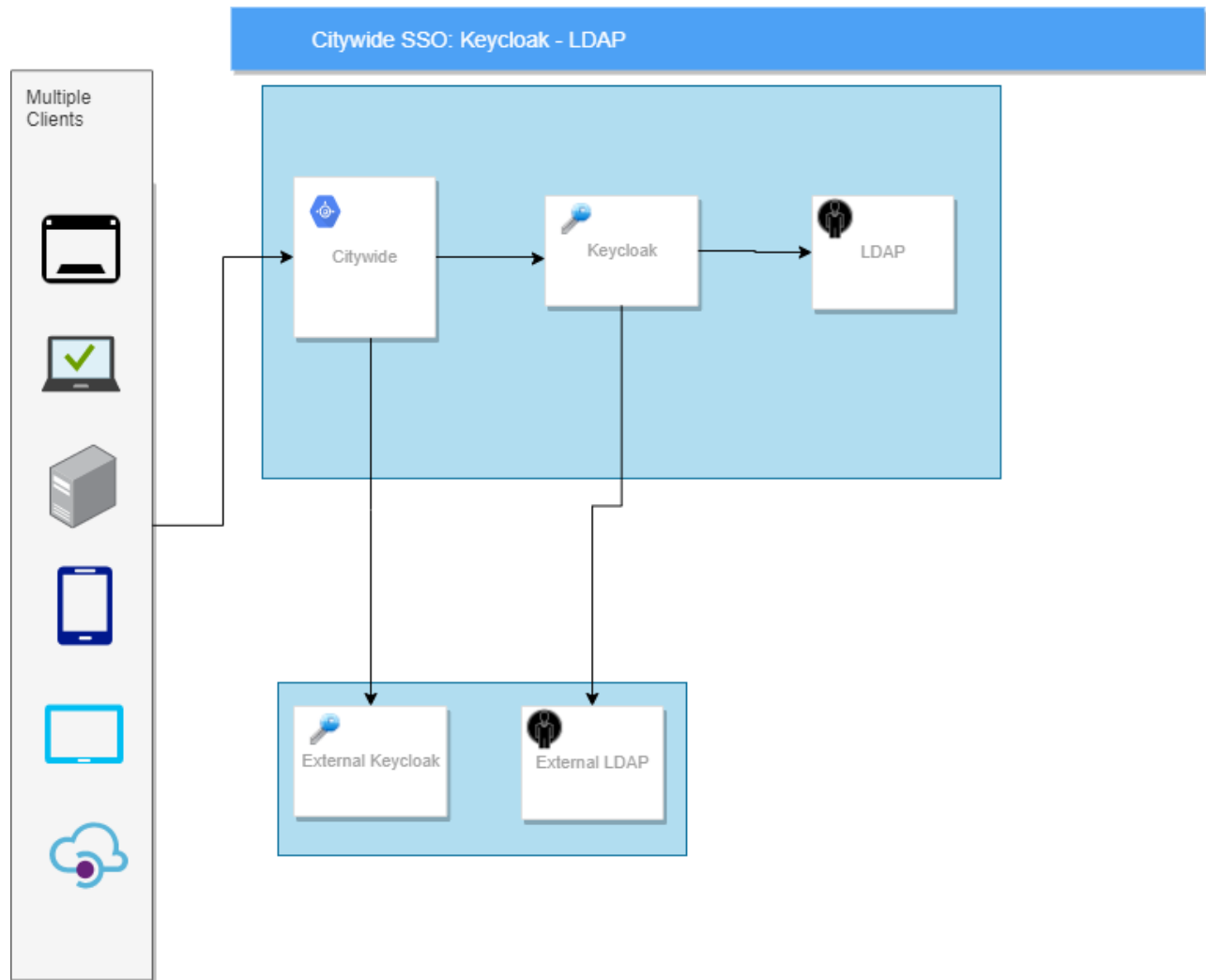
To protect all data, Citywide software performs nightly backups/recovery points, and PSD Citywide keeps a disaster site located outside of the primary hosted systems. Recovery of databases can be performed upon request. This is done at the database level, restoring the client's database with the requested date's data. To ensure the provision of Emergency System Repair, PSD has failovers / disaster recovery plans in place, and we would also repair any hardware/software/networking issues as required. In the event of declaring a disaster, clients will be notified directly via e-mail and our websites.

## Single Sign-On Overview

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

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

Below is a diagram that illustrates a Citywide SSO connection utilizing the Keycloak identity and access management solution:



#### Architecture, Data Flow, Technical Environment

Citywide Software is a complete web-based AWOMS, meaning that there are no physical data storage requirements on the part of the City. Our team will provide full implementation services and will migrate the required data into the Citywide Software Platform.

#### Citywide Security and Data Management

##### Secure Hosting Environment

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

##### Security Best Practices and Encryption

Our Firewall is configured to only allow traffic to enter the network for required services. We use various obfuscation techniques such as removing core business logic from a web browser and placing it server-side, and by obfuscating entity-level data by labeling it 'client-side' / 'obfuscated' via minify and uglify. We also have DDoS attack prevention enabled with our network equipment. Encryption and protection of data is achieved using HTTPS for all data traffic and unique user accounts and security profiles. Services provided use security and privacy technologies and protocols that meet industry standards including but not limited all data in transit (in and out) being encrypted with a 2048bit Secure Socket Layer (SSL), DES-2 or DES-3 encryption, and WPA2 (for WiFi communications). Communications between the client and servers encrypted with TLS. Nightly remote backups are encrypted with AES-256-CBC before transmitting. Passwords are stored as salted hashes (SHA-512), never as plain text. Data at rest is securely hosted and stored at our London, Ontario location. Security threats and traffic are pre-emptively monitored through an IDS/IPS and a dedicated full-time security/DevOps resource.

##### Cyber Security Audits

We perform regular security audits of our systems to ensure current updates and patches are applied on all hardware, along with updated antivirus software. We complete a yearly Cloud Security Alliance (CSA) self-audit and follow best practices for web security/ vulnerability testing including but not limited to OWASP top 10 and sanitizing data inputs. We recently conducted an External Audit/ Review of system security with a third-party auditor.

##### Security Breaches and Response Plan

PSD Citywide has had no security breaches. We will continue to ensure that all Citywide applications are secure and that there are no breaches of client data or information.



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

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

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

#### System Security Features

The Cloud tenancy space is restricted to PSD Citywide staff only and we do not provide access to the backend database. Activity Logs are available throughout our software which provide tools for the client's IT administrators to monitor changes throughout Citywide. All users are forced to use secure passwords which are stored on the server only in encrypted format. Users can control roles and permissions of accounts directly through the system.

#### Disaster Recovery/ Business Continuity Planning

We have disaster recovery/ business continuity plans in place to ensure the provision of Emergency System Repair in the event of an unplanned incident. In the event of declaring a disaster, clients will be notified directly via e-mail and our websites. Our team would then repair any hardware/software/networking issues as required. To protect all data, we perform nightly backups/recovery points, and keep a disaster site located outside of the primary hosted systems. The Source Code of the system is also backed up at an offline location.

If a current client ceases to be a client of PSD Citywide, all data would be erased and destroyed after being returned to the client. Users can export their data out of Citywide in excel format, or we can back up client data as a SQL database file and put it on a SFTP. Both options would be of no cost to the client.

#### Warranty Period

Together with any responsibilities expected of the City, PSD Citywide warrants that the professional services to be performed by our employees shall be in a manner conforming to

generally accepted industry standards and practices. PSD Citywide will use reasonable efforts to enforce any service level and warranty obligations of its suppliers.

#### Release Management Process and Services

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

Citywide users can access all relevant information related to upgrades made to the software, all new capabilities, as well as bug fixes through the release notes button on the home screen. In this section, users can see what has been added and a brief explanation of its impact. Additionally, a monthly newsletter is sent out to all Citywide software users featuring the latest software enhancements and how to use them, including helpful tips, tricks, and video tutorials.

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

## Proposed Implementation Overview

Our team of experienced implementation advisors, data analysts and asset management specialists will provide full project management and software delivery services throughout the implementation of Citywide Software. Our project manager will use well-defined tools, resources, and processes to track, review and regulate project processes to ensure that the solution is successfully implemented on time and within budget to deliver optimal value. To track the status of the project, the City will have access to our project management tool, Mavenlink, as well as our JIRA DevOps tool to track any development requests, configuration requirements, etc., if needed throughout the implementation. For a more detailed project approach please see Appendix A.

| Implementation Overview – Citywide Software Implementation   |
|--|
| <b>Phase 1 – Project Management Planning and Kick-Off</b>  |
| 1.1 Project Document Creation & Kick-off Preparation<br>1.2 Project Kick-Off Meeting<br>1.3 Finalize Project Plan<br><b>Milestone:</b> Final Module-specific Project Plan Approved, Work Commences   |
| <b>Phase 2A – Citywide Asset Manager Implementation</b>  |
| <b>Stage 2A.1 – Planning Processes and Parameters</b>  |
| 2.A.1.1 City Provides Data to PSD Citywide <b>**City to provide**</b><br>2.A.1.2 Data Moved into Templates<br>2.A.1.3 Data Gap Analysis<br>2.A.1.4 Data Review Meeting <b>**City involvement**</b><br>2.A.1.5 City Provides Outstanding Data <b>**City to provide**</b><br>2.A.1.6 Communicate Processes and Integrations for System Consistency<br><b>Milestone:</b> All Data Gathered and Analyzed, Business Processes Established |
| <b>Stage 2.A.2 – Citywide Configuration and Integration Design</b>   |
| 2.A.2.1 Additional Review of City Processes <b>**City involvement**</b><br><b>Milestone:</b> Configuration and Integration Design Determined   |
| <b>Stage 2.A.3 – Citywide Configuration, Integration and Data Upload</b>   |
| 2.A.3.1 Data Upload and Formatting<br>2.A.3.2 Inventory Review and Configuration <b>**City involvement**</b>   |

2.A.3.3 Activate Add-Ons (Asset Collector Mobile App)

**Milestone:** City Sign-off on Data, Configuration, and Integrations

#### Stage 2.A.4 – Business Process and System Training

2.A.4.1 Asset Manager Training Needs Assessment and Preparation

2.A.4.2 Training Sessions **\*\*City involvement\*\***

2.A.4.3 Training Evaluation Survey and Results Summary **\*\*City involvement\*\***

**Milestone:** All Users Trained and Comfortable with the System

#### Stage 2.A.5 – Asset Manager Testing Support

2.A.5.1 Training for UAT **\*\*City involvement\*\***

2.A.5.2 Support During Testing

**Milestone:** Asset Manager Testing is Complete, City Sign-off on Testing

#### Stage 2.A.6 – Go-Live Support and Monitoring

2.A.6.1 Hands-On Assistance During Asset Manager Go-Live

2.A.6.2 Asset Manager Stabilization Support

2.A.6.3 Phase 2A Project Close-Out

**Milestone:** Citywide Asset Manager Fully Implemented

### Phase 2B – Citywide Maintenance Manager Implementation

#### Stage 2.B.1 – Maintenance Manager Business Process Review

2.B.1.1 Test/Sandbox Site Created and Logins Generated

2.B.1.2 Pre-Implementation Analysis **\*\*City Involvement\*\***

2.B.1.3 Deliver System Configuration/Data Acquisition Templates

2.B.1.3 Assist City with Populating Templates **\*\*City Involvement\*\***

2.B.1.4 Completed Templates Delivered to PSD Citywide for Analysis **\*\*City to provide\*\***

2.B.1.5 Template Review Meeting **\*\*City Involvement\*\***

2.B.1.5 Establish Business Processes and Parameters to Support Maintenance Manager

**Milestone:** Business Processes Review and Mapping Complete, Implementation Needs Analysis Complete

#### Stage 2.B.2 – Citywide Configuration & Integration Design

2.B.2.1 Additional Review of City Processes **\*\*City Involvement\*\***

2.B.2.2 Design Configurations and API Library

**Milestone:** Configuration and Design Determined for Integrations

### Stage 2.B.3 – Test Plan Testing Scripts

2.B.3.1 Test Plan Development

2.B.3.2 Provide Sample Test Plan Scripts

2.B.5.3 Training Evaluation Survey and Results Summary **\*\*City Involvement\*\***

**Milestone:** All Users Trained and Comfortable with the System

### Stage 2.B.4 – Citywide Configuration, Integration and Data Upload

2.B.4.1 Perform Initial System Upload and Configuration

2.B.4.2 Admin User Training **\*\*City Involvement\*\***

2.B.4.3 Process Workshop **\*\*City Involvement\*\***

2.B.4.4 Test and Refine Maintenance Manager Configurations **\*\*City Involvement\*\***

2.B.4.5 Supplemental Configuration Training **\*\*City Involvement\*\***

2.B.4.6 Finalize System Processes, Configurations & User Profiles

**Milestone:** Configuration, Integration and Data Upload Complete, Key Admin Users are Trained on Core Functionality

### Stage 2.B.5 – Business Process and System Training

2.B.5.1 Maintenance Manager Training Needs Assessment and Preparation

2.B.5.2 Training Sessions

2.B.5.3 Training Evaluation Survey and Results Summary **\*\*City Involvement\*\***

**Milestone:** Configuration, Integration and Data Upload Complete, Key Admin Users are Trained on Core Functionality

### Stage 2.B.6 – Maintenance Manager Testing Support

2.B.6.1 Training to Conduct UAT

2.B.6.2 Support During Testing

### Stage 2.B.7 – Go-Live Support and Monitoring

2.A.6.1 Hands-On Assistance During Maintenance Manager Go-Live

2.A.6.2 Maintenance Manager Stabilization Support

2.A.6.3 Phase 2B Project Close-Out

**Milestone:** Citywide Maintenance Manager Fully Implemented

## Phase 3 – Project Closure

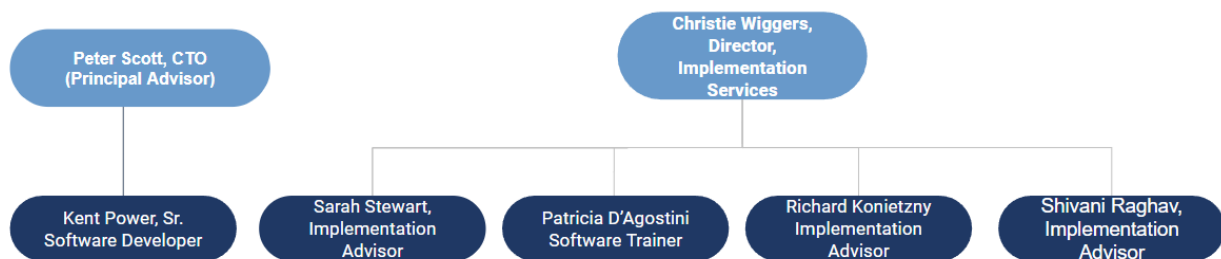
3.1 Develop and Deliver Summary Report

3.2 Summary and Review Meeting/ Project Closure **\*\*City Involvement\*\***

**Milestone:** Citywide Software for CMMS Fully Implemented, System Handed-off to the City

## Key Project Personnel and Organization

The chart below provides an overview of the reporting structure for our proposed project team.



## Brief Description of Project Team

PSD Citywide is the only consulting firm that will be responsible for implementing the Citywide platform for the City. The Table below provides a brief description of the proposed project team and their knowledge, skills and experience relevant to the deliverables that have been determined by the City.

## Lead Project Manager – Citywide Implementation



**Name:** Christie Wiggers, PMP | Director of Implementation Services

**Qualifications:** Christie possesses 16+ years of project management, GIS, EAMS, CMMS, and municipal infrastructure asset management experience in both the private and public sector. She has led 65+ similar EAM and CMMS implementation projects for public sector clients, including large and complex, multi-year, enterprise-wide engagements.

Prior to joining PSD Citywide, Christie gained significant municipal experience working for the City of Hamilton, Ontario from 2002 to 2015. During her time with the City, Christie displayed consistent growth within the engineering and public works departments working as an Engineering Systems Technologist, a Project Manager – Infrastructure Systems (Public Works), and as an Asset Management Systems Analyst (Public Works). Among other duties and accomplishments, Christie was responsible for the analysis, design, implementation, and maintenance of Infrastructure Asset Management and GIS applications, including working with municipal stakeholders to define, analyze, and document workflows to implement and maintain the City's Citywide Software Platform.

Christie is a Project Management Professional (PMP) through the Project Management Institute and has obtained her IAM Certificate from the Institute of Asset Management, Foundation Certificate in IT Service Management from itSMF Canada, and B.A., Social Science (Geography/GIS) from McMaster University.

**Roles and Responsibilities:** As the Lead Project Manager, Christie will be responsible for leading her team of implementation analysts in setting up the Citywide Maintenance Manager module while providing direction and advice to the Counties on industry best practices and processes related to operations and maintenance management.

## Assigned Staff - Asset Manager Implementation



**Name:** Richard Konietzny | Implementation Advisor

**Qualifications:** Richard has over six years of experience manipulating client-supplied financial and infrastructure data within government organizations' proprietary databases and analytical modeling tools. Since joining PSD Citywide in 2016, Richard has completed over 100 similar software implementations of enterprise asset management systems.

Richard has obtained his IAM Certificate from the Institute of Asset Management and his Business Accounting Diploma from Algonquin College, and is currently completing the Municipal Accounting and Finance Program through the Association of Municipal Clerks and Treasurers of Ontario (AMCTO).

**Role and Responsibilities:** Richard will provide direct support throughout all tasks related to the collection, manipulation, migration/upload, gap analysis, and integration of the City's data, working with the Counties to fully populate and configure the Citywide Asset Manager module.

## Assigned Staff - Asset Manager Implementation



**Name:** Chris Vanderheyden | Program Manager, Asset Management Advisory

**Qualifications:** Chris possesses over 30 years of extensive combined experience in private and public infrastructure planning, development, design, and data management. Chris actively engages with clients on Asset Management program development projects with municipalities across Canada. This includes activities such as workshops designed to develop condition assessment templates/ procedures, asset registry and hierarchy development and working with local government staff to develop and expand asset management processes and responsibilities. Chris has been involved with over 200 asset management program development and software implementation projects with PSD Citywide alone.

In his previous role at Oxford County, Chris was responsible for Corporate GIS/Asset Management activities. While at the County, he was responsible for managing and



updating PNID's (Process and Instrumentation Diagrams) for the water and wastewater treatment facilities, geo-locating water assets for inventory and mapping purposes, and acting as a CAD Operator for all assets including water, wastewater and storm water.

**Roles and Responsibilities:** Chris will support the configuration of the Counties asset management processes for risk, lifecycle and condition into Citywide Asset Manager.

## Assigned Staff – Software Trainer



**Name:** Patricia D'Agostini | Software Trainer

**Qualifications:** Patricia is a subject matter expert in our Citywide software platform and possesses 15+ years of experience conducting training needs assessments, leading training sessions, and creating training and support content in software-driven environments. Patricia has developed her vast experience in educating and instructing a variety of clients with varying technical skills as a Training Specialist for a leading public sector budget management software company, as an Adult Education Facilitator for TSA, Community Services Calgary, as well as possessing early experience in Software Training Specialist and Technology Training Specialist roles for numerous companies.

Patricia obtained her Adult Education Train the Trainer Certificate from ExecuTrain, completed courses in Adult Learning through the University of Toronto and Human Behaviour in Organizations through the University of Calgary, and has obtained her bachelor's degree in political science and Canadian studies from York University.

**Roles and Responsibilities:** Patricia will perform training needs assessments and will conduct system training for staff to ensure users are comfortable with Citywide.

## Assigned Staff – Maintenance Manager Implementation



**Name:** Shivani Raghav, M.Eng. CEM | Implementation Advisor

**Qualifications:** Shivani is a transportation planner and engineer with 4 years' experience as a data analyst conducting quantitative assessments and research related to transportation systems, housing, demographics, and the urban form. She is proficient in collecting, managing, manipulating, and visualizing data for exploratory and statistical analyses with expertise in transportation planning, travel demand modelling, environmental assessments, feasibility, and impact studies. Shivani has obtained her M.Eng. CEM (Cities Engineering and Management) with a Specialization in Transportation Systems from the University of Toronto, a Master of Technology (Infrastructure Planning) from CEPT University, India, a Certificate in Development of Green and Sustainable Planned Communities from the University of California Irvine Extension, and her Bachelor of Architecture from Lucknow University, India.

**Roles and Responsibilities:** Shivani will work with the Counties to migrate data into the system, manipulate data, customize workflow and processes within the system, and



deliver customized training. She will evaluate the operational structure and workflow within different business units of the Counties to collect, analyze, verify, and upload existing data and will configure the database to capture workflow and current processes. She will also provide support during go-live to document and troubleshoot any issues if needed.

## Assigned Staff – Maintenance Manager Implementation



**Name:** Sarah Stewart | Senior Implementation Advisor

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

**Roles and Responsibilities:** Sarah will implement new Counties data within the system, customizing workflow and processes, delivering customized training, and maintaining direct communication with clients. Sarah also configures Citywide software and provides software support, testing, and troubleshooting as needed.

## Technical Advisors to the Project

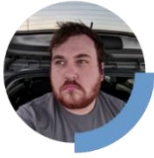


**Name:** Peter Scott, MBA, H.B.Sc, B.Sc, CSM | Chief Technology Officer

**Qualifications:** Peter possesses 18+ years of extensive, executive level experience with leading information and technology consulting organizations. He has a proven track record for bridging business needs by using technology solutions to deliver real, lasting results, and enjoys the challenges of leveraging data to improve the financial and operational performance of public sector clients. Peter leads the development and deployment of our Citywide software applications and related advisory services.

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

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



**Name:** Kent Power | Senior Software Developer

**Qualifications:** Kent is a software engineering professional with experience in full stack development, mobile application development, product innovation, geospatial and environmental analysis, and GIS data formats design. Kent has a demonstrated history of working in the information services industry, having contributed to the development of all Citywide software modules, and having completed system integrations with ESRI GIS, GeoServer, Active Directory, SSO, and PostgreSQL, and other third-party systems. Kent is skilled in C++, Java, JavaScript, and PHP, among other languages.

**Roles and Responsibilities:** Based on the results of initial assessments, Kent will meet with the City's IT representatives and will be assigned to establish and test agreed-upon integrations. Once it is confirmed that the connection is working as expected, Kent will complete go-live and move the connection to the City's Citywide production database.

# Price Proposal

Table A – Costs Associated with Installation/Implementation and Year 1 Costs of new MMS

| QTY               | UOM | ITEM DESCRIPTION  | PRICE                |
|-------------------|-----|---|----------------------|
| 1                 | Ea  | Project Management- includes all project management services for full implementation  | \$ 9,600.00          |
| 1                 | Ea  | Full data migration/conversion from Fleetnet to new software including:<br><br>Fully migrating all existing parts and fluids in RTS' inventory.<br><br>Fully migrating all vehicles, equipment, buildings, shelters, and bus stops.<br><br>Fully migrating preventative maintenance historical data | \$124,000.00         |
| 1                 | Ea  | Installation of Software including all travel costs and days on site  | \$ 23,600.00         |
| 1                 | Ea  | Cost to Integrate with Fleetwatch   | \$ 12,600.00         |
| 1                 | Ea  | Cost for partial integration with Clever Devices  | \$30,600.00          |
| 1                 | Ea  | License Fees- Cost for Year 1   | \$ 60,000.00         |
| 1                 | Ea  | Cost for Training   | \$ 11,200.00         |
| 1                 | Ea  | Additional Costs: Any additional costs for a full implementation not included in the above. Use separate sheet if necessary.  | \$ 9,000.00          |
| <b>Total Cost</b> |     |   | <b>\$ 281,200.00</b> |

Table B- Annual Maintenance and Support Costs

| These fixed costs are for Year 2 through Year 5 and must include any update/upgrade costs. |              |
|--|--------------|
| Year 2   | \$ 63,000.00 |
| Year 3   | \$ 66,150.00 |
| Year 4   | \$ 69,450.00 |
| Year 5   | \$ 72,950.00 |

# Forms

## PART 10 – EXHIBITS

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The following documents/forms are included in this section:

- Drug-Free Workplace Form
- Bidder Verification Form
- Reference Form
- Certification Regarding Debarment
- Certification Regarding Lobbying
- Disclosure of Lobbying Activities (includes instruction page)
- Contractor Responsibility Certification
- Federally Funded Purchase Questionnaire

**NOTE: The following Excel documents are not included in this document, but have been uploaded separately into DemandStar for proposer convenience in completing:**

- Attachment 1 - Maintenance Management System Specification Checklist
- Attachment 2 - Vendor Technology Questionnaire

## DRUG-FREE WORKPLACE FORM

The undersigned bidder in accordance with Florida Statute 287.087 hereby certifies that

PSD Citywide (US) Inc.

does:

(Name of Bidder)

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for the drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).
4. In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign the statement, I certify that this bidder complies fully with the above requirements.

Matthew Dawe

Bidder's Signature

August 21, 2023

Date

***In the event of a tie bid, bidders with a Drug Free Workplace Program will be given preference. To be considered for the preference, this document must be completed and uploaded to DemandStar.com with your Submittal.***

# BIDDER VERIFICATION FORM

**LOCAL PREFERENCE** (Check one) **Not Applicable-INTENTIONALLY LEFT BLANK**

**QUALIFIED SMALL BUSINESS AND/OR SERVICE DISABLED VETERAN BUSINESS STATUS** (Check one)  
**Not Applicable-INTENTIONALLY LEFT BLANK**

## **REGISTERED TO DO BUSINESS IN THE STATE OF FLORIDA**

Is Bidder registered with Florida Department of State's, Division of Corporations, to do business in the State of Florida?

YES     NO (refer to Part 1, 1.6, last paragraph)

If the answer is "YES", provide a copy of SunBiz registration or SunBiz Document Number (# F22000004163)

If the answer is "NO", please state reason why: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

PSD Citywide (US) Inc.

Bidder's Name

Matthew Dawe, Vice-President

Printed Name/Title of Authorized Representative

Matthew Dawe

Signature of Authorized Representative

August 21, 2023

Date

## REFERENCE FORM

Name of Bidder: PSD Citywide (US) Inc.

Provide information for three references of similar scope performed within the past five (5) years. You may include photos or other pertinent information.

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#1 Year(s) services provided (i.e. 1/2015 to 12/2018): 01/2007 - 08/2023

Company Name: City of Windsor  
Address: 400 City Hall Square East, Suite 403  
City, State Zip: Windsor, Ontario, Canada, N9A 7K6  
Contact Name: Kathy Roeder, Asset Coordinator  
Phone Number: +1 (519) 225-6100 Ext. 6255 Fax Number: \_\_\_\_\_  
Email Address (if available): kroeder@citywindsor.ca

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#2 Year(s) services provided (i.e. 1/2015 to 12/2018): 09/2019 – 08/2023

Company Name: BC Parks, Ministry of Environment and Climate Change Strategy  
Address: PO BOX 9398 STN PROV GOV  
City, State Zip: Victoria, British Columbia, CANADA, V8W 9M9  
Contact Name: Hilary Parry, Facility Officer - Capital Investment Program  
Phone Number: +1 (250) 387-6121 Fax Number: \_\_\_\_\_  
Email Address (if available): hilary.parry@gov.bc.ca

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#3 Year(s) services provided (i.e. 1/2015 to 12/2018): 04/2020 – 08/2023

Company Name: County of Wellington  
Address: 74 Woolwich Street  
City, State Zip: Guelph, Ontario, Canada, N1H 3T9  
Contact Name: Andrea Brossault, Asset Manager Coordinator  
Phone Number: +1 (519) 837-2600 Ext. 2291 Fax Number: \_\_\_\_\_  
Email Address (if available): andreab@wellington.ca

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## CERTIFICATION REGARDING DEBARMENT

The Contractor shall comply and facilitate compliance with U.S. DOT regulations, “Nonprocurement Suspension and Debarment,” 2 C.F.R. part 1200, which adopts and supplements the U.S. Office of Management and Budget (U.S. OMB) “Guidelines to Agencies on Governmentwide Debarment and Suspension (Nonprocurement),” 2 C.F.R. part 180. These provisions apply to each contract at any tier of \$25,000 or more, and to each contract at any tier for a federally required audit (irrespective of the contract amount), and to each contract at any tier that must be approved by an FTA official irrespective of the contract amount. As such, the Contractor shall verify that its principals, affiliates, and subcontractors are eligible to participate in this federally funded contract and are not presently declared by any Federal department or agency to be:

- a) Debarred from participation in any federally assisted Award;
- b) Suspended from participation in any federally assisted Award;
- c) Proposed for debarment from participation in any federally assisted Award;
- d) Declared ineligible to participate in any federally assisted Award;
- e) Voluntarily excluded from participation in any federally assisted Award; or
- f) Disqualified from participation in any federally assisted Award.

By signing and submitting its proposal, the bidder certifies as follows:

The certification in this clause is a material representation of fact relied upon by CITY. If it is later determined by CITY that the bidder knowingly rendered an erroneous certification, in addition to remedies available to CITY, the Federal Government may pursue available remedies, including but not limited to suspension and/or debarment. The bidder agrees to comply with the requirements of 2 C.F.R. part 180, subpart C, as supplemented by 2 C.F.R. part 1200, while this offer is valid and throughout the period of any contract that may arise from this offer. The bidder further agrees to include a provision requiring such compliance in its lower tier covered transactions.

Matthew Dawe

Signature of Bidder’s Authorized Official

Matthew Dawe

Name of Bidder’s Authorized Official

Vice-President

Title of Bidder’s Authorized Official

August 21, 2023

Date

## CERTIFICATION REGARDING LOBBYING

The undersigned certifies, to the best of his or her knowledge and belief, that:

1. No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.
2. If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions
3. The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Matthew Dawe

Signature of Bidder's Authorized Official

Matthew Dawe

Name of Bidder's Authorized Official

Vice-President

Title of Bidder's Authorized Official

August 21, 2023

Date

# DISCLOSURE OF LOBBYING ACTIVITIES

Approved by OMB

Complete this form to disclose lobbying activities pursuant to 31 U.S.C. 1352

0348-0046

(See next page for public burden disclosure.)

|  |  |   |
|--|--|---|
| <b>1. Type of Federal Action:</b><br><input checked="" type="checkbox"/> a. contract<br><input type="checkbox"/> b. grant<br><input type="checkbox"/> c. cooperative agreement<br><input type="checkbox"/> d. loan<br><input type="checkbox"/> e. loan guarantee<br><input type="checkbox"/> f. loan insurance   | <b>2. Status of Federal Action:</b><br><input checked="" type="checkbox"/> a. bid/offer/application<br><input type="checkbox"/> b. initial award<br><input type="checkbox"/> c. post-award | <b>3. Report Type:</b><br><input checked="" type="checkbox"/> a. initial filing<br><input type="checkbox"/> b. material change<br><b>For Material Change Only:</b><br>year _____ quarter _____<br>date of last report _____ |
| <b>4. Name and Address of Reporting Entity:</b><br><input type="checkbox"/> Prime <input type="checkbox"/> Subawardee<br><br>NA                      Tier _____, <i>if known</i> :<br><br>Congressional District, <i>if known</i> : 4c   | <b>5. If Reporting Entity in No. 4 is a Subawardee, Enter Name and Address of Prime:</b><br><br>NA<br><br>Congressional District, <i>if known</i> :  |   |
| <b>6. Federal Department/Agency:</b><br><br>NA   | <b>7. Federal Program Name/Description:</b><br><br>NA<br>CFDA Number, <i>if applicable</i> : _____   |   |
| <b>8. Federal Action Number, <i>if known</i> :</b><br>NA   | <b>9. Award Amount, <i>if known</i> :</b><br>\$ NA   |   |
| <b>10. a. Name and Address of Lobbying Registrant</b><br><i>(if individual, last name, first name, MI):</i><br><br>NA  | <b>b. Individuals Performing Services</b> <i>(including address if different from No. 10a )</i><br><i>(last name, first name, MI):</i><br><br>NA   |   |
| <b>11.</b> Information requested through this form is authorized by title 31 U.S.C. section 1352. This disclosure of lobbying activities is a material representation of fact upon which reliance was placed by the tier above when this transaction was made or entered into. This disclosure is required pursuant to 31 U.S.C. 1352. This information will be available for public inspection. Any person who fails to file the required disclosure shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure. | Signature: <u>Matthew Dawe</u><br>Print Name: <u>Matthew Dawe</u><br>Title: <u>Vice-President</u><br>Telephone No.: <u>+1 (519) 690-2565</u> Date: <u>21 August 2023</u>                   |   |
| <b>Federal Use Only:</b>   |  | Authorized for Local Reproduction<br>Standard Form LLL (Rev. 7-97)  |

**Complete and upload to DemandStar.com with your Submittal. Sign and mark "N/A" if not applicable.**

## INSTRUCTIONS FOR COMPLETION OF SF-LLL, DISCLOSURE OF LOBBYING ACTIVITIES

This disclosure form shall be completed by the reporting entity, whether subawardee or prime Federal recipient, at the initiation or receipt of a covered Federal action, or a material change to a previous filing, pursuant to title 31 U.S.C. section 1352. The filing of a form is required for each payment or agreement to make payment to any lobbying entity for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with a covered Federal action. Complete all items that apply for both the initial filing and material change report. Refer to the implementing guidance published by the Office of Management and Budget for additional information.

1. Identify the type of covered Federal action for which lobbying activity is and/or has been secured to influence the outcome of a covered Federal action.
2. Identify the status of the covered Federal action.
3. Identify the appropriate classification of this report. If this is a follow-up report caused by a material change to the information previously reported, enter the year and quarter in which the change occurred. Enter the date of the last previously submitted report by this reporting entity for this covered Federal action.
4. Enter the full name, address, city, State and zip code of the reporting entity. Include Congressional District, if known. Check the appropriate classification of the reporting entity that designates if it is, or expects to be, a prime or subaward recipient. Identify the tier of the subawardee, e.g., the first subawardee of the prime is the 1st tier. Subawards include but are not limited to subcontracts, subgrants and contract awards under grants.
5. If the organization filing the report in item 4 checks "Subawardee," then enter the full name, address, city, State and zip code of the prime Federal recipient. Include Congressional District, if known.
6. Enter the name of the Federal agency making the award or loan commitment. Include at least one organizational level below agency name, if known. For example, Department of Transportation, United States Coast Guard.
7. Enter the Federal program name or description for the covered Federal action (item 1). If known, enter the full Catalog of Federal Domestic Assistance (CFDA) number for grants, cooperative agreements, loans, and loan commitments.
8. Enter the most appropriate Federal identifying number available for the Federal action identified in item 1 (e.g., Request for Proposal (RFP) number; Invitation for Bid (IFB) number; grant announcement number; the contract, grant, or loan award number; the application/proposal control number assigned by the Federal agency). Include prefixes, e.g., "RFP-DE-90-001."
9. For a covered Federal action where there has been an award or loan commitment by the Federal agency, enter the Federal amount of the award/loan commitment for the prime entity identified in item 4 or 5.
10. (a) Enter the full name, address, city, State and zip code of the lobbying registrant under the Lobbying Disclosure Act of 1995 engaged by the reporting entity identified in item 4 to influence the covered Federal action.  
  
(b) Enter the full names of the individual(s) performing services, and include full address if different from 10 (a). Enter Last Name, First Name, and Middle Initial (MI).
11. The certifying official shall sign and date the form; print his/her name, title, and telephone number.

According to the Paperwork Reduction Act, as amended, no persons are required to respond to a collection of information unless it displays a valid OMB Control Number. The valid OMB control number for this information collection is OMB No. 0348-0046. Public reporting burden for this collection of information is estimated to average 10 minutes per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the Office of Management and Budget, Paperwork Reduction Project (0348-0046), Washington, DC 20503.

## CONTRACTOR RESPONSIBILITY CERTIFICATION

The Bidder is required to certify compliance with the following contractor responsibility standards by checking appropriate boxes. For purposes hereof, all relevant time periods are calculated from the date this Certification is executed.

|  | YES                                 | NO                                  |
|--|-------------------------------------|-------------------------------------|
| 1. Has the firm been suspended and/or debarred by any federal, state or local government agency or authority in the past three years?  | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| 2. Has any officer, director, or principal of the firm been convicted of a felony relating to your business industry?  | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| 3. Has the firm defaulted on any project in the past three (3) years?  | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| 4. Has the firm had any type of business, contracting or trade license revoked or suspended for cause by any government agency or authority in the past three (3) years?   | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| 5. Has the firm been found in violation of any other law relating to its business, including, but not limited to antitrust laws, licensing laws, tax laws, wage or hour laws, environmental or safety laws, by a final unappealed decision of a court or government agency in the past three (3) years, where the result of such adjudicated violation was a payment of a fine, damages or penalty in excess of \$1,000?       | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| 6. Has the firm been the subject of voluntary or involuntary bankruptcy proceedings at any time in the past three (3) years?   | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| 7. Has the firm successfully provided similar products or performed similar services in the past three (3) years with a satisfactory record of timely deliveries or on-time performance?   | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| 8. Does the firm currently possess all applicable business, contractor and/or trade licenses or other appropriate licenses or certifications required by applicable state or local laws to engage in the sale of products or services?   | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| 9. Does the firm have all the necessary experience, technical qualifications and resources, including but not limited to equipment, facilities, personnel and financial resources, to successfully provide the referenced product(s) or perform the referenced service(s), or will obtain same through the use of qualified, responsible subcontractors?   | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| 10. Does the firm meet all insurance requirements per applicable law or bid specifications including general liability insurance, workers' compensation insurance, and automobile liability insurance?   | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| 11. Firm acknowledges that it must provide appropriate documentation to support this Contractor Responsibility Certification if so requested by the City of Gainesville. The firm also understands that the City of Gainesville may request additional information or documents to evaluate the responsibility of firm. Firm agrees to provide such additional information or supporting documentation for this Certification. | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |

Under the penalty of perjury, the Bidder's authorized representative hereby certifies that all responses marked in this form or otherwise submitted for purposes of determining the Bidder's status as a responsible contractor is true, complete and accurate and that he/she has knowledge and authority to verify the information in this certification or otherwise submitted on behalf of the Bidder by his or her signature below.

Matthew Dawe  
 Signature of Bidder's Authorized Official

Matthew Dawe  
 Name of Bidder's Authorized Official

Vice-President  
 Title of Bidder's Authorized Official

21 August 2021  
 Date

# FEDERALLY FUNDED PURCHASE QUESTIONNAIRE

Maintenance Management System for Transit - RTSX-230065-DS

This is a federally assisted contract and your response to this questionnaire helps the City in setting \*Disadvantaged Business Enterprise (DBE) goals with the federal government. Please complete and return this form with your bid response.

Bidder Name: PSD Citywide (US) Inc.

Bidder Address: 4830 West Kennedy Blvd. Suite 600

Tampa, Florida, 33609

Is Bidder a DBE?  Yes  No

Age of Firm: 20 years

Annual Gross Receipts of the Firm: (check one)

Less than \$500,000

\$500,000-\$1 million

\$1-2 million

\$2-5 million

More than \$5 million

***\*To be able to claim DBE status referenced above the bidder must be currently listed in the Florida Unified Certification Program (UCP) Disadvantaged Business Enterprise (DBE) Directory maintained by the Florida Department of Transportation's (FDOT).***

**PART 11 – NO BID SURVEY**

**GENERAL GOVERNMENT  
PROCUREMENT DIVISION SURVEY  
BID INFORMATION**

**RFP #:** RTSX-230065-DS

**DUE DATE:** August 21, 2023, @ 3:00 pm

**PROPOSAL TITLE:** Maintenance Management System for Transit (Rebid)

**IF YOU DO NOT BID**

If you choose to not bid, please complete this form, and either upload it into DemandStar.com or email to the procurement specialist. Your responses will assist the City in developing future solicitations, your responses will remain anonymous and will be aggregated into a spreadsheet for analysis purposes only.

Check the appropriate responses and provide additional information that may help the City develop future solicitations.

1. \_\_\_\_\_ The solicitation time-frame was too short
2. \_\_\_\_\_ My company did not learn of this solicitation until it was too late to develop a response
3. \_\_\_\_\_ My company's work load did not allow time to develop a submittal
4. \_\_\_\_\_ If awarded, my company's work load could not support this project
5. \_\_\_\_\_ Specifications were not clear
6. \_\_\_\_\_ My company does not handle this type of work
7. \_\_\_\_\_ My company does not submit responses to Municipalities
8. \_\_\_\_\_ Have experienced delays in payments from Government agencies in the past
9. \_\_\_\_\_ Is there anything the City could have done differently in the solicitation package to prompt your company to submit a proposal?  
Explain: \_\_\_\_\_
10. \_\_\_\_\_ If the City were to rebid this solicitation, would your company be interested in responding?
11. \_\_\_\_\_ Please provide any additional information regarding this solicitation that may help us develop our next steps in fulfilling the City's needs for this project.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Bidder Name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Is your company a certified City of Gainesville small business?  YES  NO

Is your company a certified City of Gainesville service-disabled veteran business?  YES  NO

# Appendix A – Detailed Project Approach

In this Appendix, we elaborate on the Proposed Approach in Tab G of the RFP Submission.

## Phase 1. Project Management Planning and Kick-Off

| Key Outputs   | Key Outcomes  |
|---|---|
| <ul style="list-style-type: none"><li>• Kick-off Materials and Agenda</li><li>• Kick-off Meeting</li><li>• Project Management Plan</li><li>• Additional Project Documentation</li></ul> | <ul style="list-style-type: none"><li>• Clear, established objectives and a defined course of action</li><li>• Increased likelihood of achieving project objectives</li></ul> |

### 1.1 Project Document Creation & Kick-off Preparation

To ensure a clear understanding of the scope of work, our project team will develop materials that focus on project vision/direction, objectives/outcomes, anticipated benefits, and proposed timelines ahead of the kick-off meeting. Our project manager will also generate a project register and complete any additional project documentation required for this engagement.

### 1.2 Project Kick-Off Meeting **\*\*City involvement\*\***

Our assigned project manager will hold a formal project initiation meeting with key stakeholders to establish points of contact, build initial consensus on project approach, assign responsibilities, and ensure all initiating tasks are complete before work begins.

Core members of our team will also be available to answer any City questions and explain aspects of the proposed implementation approach in more granular detail. It is anticipated that this kick-off meeting will be 1.5 hours long.

### 1.3 Finalize Project Plan **\*\*City involvement\*\***

Our project manager will work with the City to finalize a tailored project management plan, aligned with the Project Management Body of Knowledge (PMBOK), which documents all identified project goals and objectives, roles and responsibilities of project stakeholders, as well as project risks and methods of mitigation.

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

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

**Milestone:**

**Final Project Plan Approved,  
Work Commences**



# Phase 2.A.: Citywide Asset Manager Implementation

## Stage 2A.1 – AM Planning Processes and Parameters

| Key Outputs   | Key Outcomes  |
|---|---|
| <ul style="list-style-type: none"><li>• Departmental process review meetings</li><li>• Business processes and parameters for asset management planning documented</li></ul> | <ul style="list-style-type: none"><li>• Business Processes Required to Support Asset Manager Defined and Delivered</li><li>• Processes and Integrations Required for Consistent Datasets Understood</li></ul> |

### 2.A.1.1 City Provides Data to PSD Citywide **\*\*City to provide\*\***

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

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

- Legacy data from MicroMain
- Accounting Fixed Asset Registers
- Insurance Asset Registers
- Asset Registry
- Access or Excel files

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

### 2.A.1.2 Data Moved into Templates

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

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

### 2.A.1.3 Data Gap Analysis

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

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

#### 2.A.1.4 Data Review Meeting **\*\*City involvement\*\***

Our project manager will schedule a meeting with appropriate City staff to review the results of the initial gap analysis, including any inconsistencies we have found within the data or additional data that must be supplied by the City to move forward.

#### 2.A.1.5 City Provides Outstanding Data **\*\*City to provide\*\***

Additional time can be allotted for the City to collect or create solutions for any missing data identified throughout the gap analysis. We can assist with this process and provide advice to the City on the best practices for filling in the gaps. The stage's duration may be adjusted at this time based on the scope of the outstanding data and the time the City will need to provide it.

This stage will be considered complete once our team has received all applicable data in a format that can be uploaded to the system.

#### 2.A.1.6 Communicate Processes and Integrations for System Consistency

A review of the City's current asset registry may be necessary to ensure that all desired data is uploaded into the system. Our team will come up with a process and integration strategy to connect Citywide with the City's required systems to ensure consistency.

**Milestone:**

**All Data Gathered and Analyzed,  
Business Processes Established**

### Stage 2.A.2 – Citywide Configuration & Integration Design

| Key Outputs  | Key Outcomes  |
|--|---|
| <ul style="list-style-type: none"><li>Meeting with IT/Integration stakeholders</li></ul> | <ul style="list-style-type: none"><li>Configurations and integrations further understood and designed</li></ul> |

#### 2.A.2.1 Additional Review of City Processes **\*\*City involvement\*\***

After the kick-off meeting, we will schedule a meeting with the City's IT and Integration staff to review the required configuration and integration needs.

**Milestone:**

**Configuration and Integration  
Design Determined**

## Stage 2.A.3 – Citywide Configuration, Integration and Data Upload

| Key Outputs   | Key Outcomes   |
|---|--|
| <ul style="list-style-type: none"> <li>• Data migrated into Citywide Asset Manager module</li> <li>• Data Configuration</li> <li>• Activate Asset Collector Mobile App</li> </ul> | <ul style="list-style-type: none"> <li>• Fully populated asset register</li> <li>• Fully configured asset management planning software that supports the management of all asset classes</li> <li>• Complete review of Citywide API libraries required to integrate with City's current systems</li> </ul> |

### 2.A.3.1 Data Upload and Formatting

Our assigned data analysts will load all City required data into Asset Manager and begin a thorough data analysis within the system. Any additional fields that are necessary for system use will be considered, including any agreed upon data requirements.

### 2.A.3.2 Inventory Review and Configuration

Our project manager will provide a summary of all uploaded data to the City via an export to excel or will enable the City to access their database within the system, depending on the City's preference and expressed proficiency with Asset Manager. Time will be allotted for the City to perform a review of their asset inventory/ reporting. We will work with the City to implement any final recommendations or make any required adjustments at this time. This stage will be considered complete once the City staff formally signs off on their data within the system.

### 2.A.3.3 Activate Add-Ons (Asset Collector Mobile App)

We will activate the proposed add-on functionality, enabling use of the Asset Collector Mobile App and will establish proper permissions for designated users. Our assigned Training Specialist can work with the City throughout activation and configuration to determine training needs for the add-ons and incorporate those needs into the training plan.

**Milestone:**

**City Sign off on Data, Configuration, and Integrations**

## Stage 2.A.4 Business Process and System Training

| Key Outputs  | Key Outcomes   |
|--|--|
| <ul style="list-style-type: none"> <li>• Training needs assessment</li> <li>• Training sessions and materials</li> <li>• Training evaluation survey and summary of survey responses</li> </ul> | <ul style="list-style-type: none"> <li>• All City users are comfortable with Citywide Asset Manager</li> <li>• All City Processes have been reviewed against the system</li> </ul> |

### 2.A.4.1 Asset Manager Training Needs Assessment and Preparation

Our Training Specialist will work with the City to identify training requirements and approaches which maximize staff understanding and use of the system. The result of the assessment will be a fully customized, City -approved training plan that will provide an overview of the anticipated training and will lead to the development of tailored training documentation such as schedules,

agendas, and training presentation slides and handouts. This task can also be completed at project kick-off.

#### 2.A.4.2 Training Sessions

Training sessions will use a demo database that replicates the City's own software environment with City data to maximize training effectiveness and allow users to match familiar data to software functions.

On-site training is available upon request, at an additional cost.

#### 2.A.4.3 Training Evaluation Survey and Results Summary **\*\*City Involvement\*\***

After training, we will send a training evaluation survey to be completed by participants and will include responses in a summary document.

**Milestone:**

**All Users Trained and  
Comfortable with the System**

## Stage 2.A.5 Asset Manager Testing Support

| Key Outputs  | Key Outcomes   |
|--|--|
| <ul style="list-style-type: none"> <li>• Training session for User Acceptance Testing (UAT)</li> </ul> | <ul style="list-style-type: none"> <li>• Sample Testing Scripts</li> </ul> |

### 2.A.5.1 Training for UAT

We will host a workshop with the City’s test team to ensure the City understands how to conduct UAT using the sample test scripts.

### 2.A.5.2 Support During Testing

We will support the City with the following testing services as required:

- Train the City’s test team to User Acceptance
- Develop test data to support defined test scenarios
- Issue tracking via an issue tracking tool
- Performance testing tools
- Issue, resolution tracking and regression testing

At this stage, the Asset Manager Database is in a test environment. All training and testing transactions can be removed prior to go-live. We will create a sandbox environment (copy) for testing and training.

**Milestone:**

**Asset Manager Testing Complete,  
City Sign-off on Testing**

## Stage 2.A.6 – Go-Live Support and Monitoring

| Key Outputs  | Key Outcomes   |
|--|--|
| <ul style="list-style-type: none"> <li>• Direct support during Asset Manager go-live</li> <li>• Transition to Citywide Support</li> <li>• Stabilization support</li> <li>• Phase 2.A. project close-out processes</li> </ul> | <ul style="list-style-type: none"> <li>• Fully functioning asset management planning software solution that will support City users in managing organizational assets</li> </ul> |

### 2.A.6.1 Hands-On Assistance During Asset Manager Go-Live

Our project manager will be in direct contact with the City to facilitate our “one-click” go-live milestone, maintaining communication with staff. At this time, and immediately following go-live, our Asset Manager implementation team will be available for questions and assistance to ensure a smooth corporate transition to the use of Citywide Asset Manager and its add-ons.

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

### 2.A.6.2 Asset Manager Stabilization Support

Our team will provide the requested Stabilization support for a period of two months following go-live of the Citywide Asset Manager module.

### 2.A.6.3 Phase 2A Project Close-Out

Our Asset Manager project manager will compile key findings from the implementation and include them in a final project close-out report that will be presented to the City. The report can include an overview of key events and activities, significant variations, lessons learned, and recommendations for future steps the City can take to expand their use of Citywide.

Our project manager can host a close-out meeting to review the project report with City staff, or present key findings to stakeholders. Once the City has full access to Citywide Asset Manager, Phase 2A will be officially handed off to the City.

**Milestone:**

**Citywide Asset Manager Fully Implemented**

## Phase 2.B. – Citywide Maintenance Manager Implementation

### Stage 2.B.1 – Maintenance Manager Business Process Review

| Key Outputs  | Key Outcomes  |
|--|---|
| <ul style="list-style-type: none"><li>• Maintenance management business process review and meetings</li><li>• Implementation needs analysis</li><li>• GIS data coordination processes and integrations developed</li></ul> | <ul style="list-style-type: none"><li>• Stakeholders understand how business processes will be supported by Citywide Maintenance Manager</li><li>• Processes and parameters established for work order management</li></ul> |

#### 2.B.1.1 Test/Sandbox Site Created and Logins Generated

We will create the City's unique test/sandbox login site, set initial agreed permissions, and send emails to key Citywide staff containing login information.

#### 2.B.1.2 Pre-Implementation Analysis **\*\*City Involvement\*\***

During the pre-implementation analysis, PSD Citywide will conduct a comprehensive assessment of the City's existing maintenance practices, workflows, and challenges. We will collaborate with key stakeholders, including maintenance personnel, department heads, and IT professionals, to gather relevant information and insights in preparation for the System Implementation.

Based on the findings and recommendations from the pre-implementation analysis, a detailed implementation plan will be developed. This plan will outline the necessary steps, timelines, resource requirements, and training programs needed to successfully deploy Maintenance Management system for the City's operations.

### 2.B.1.3 Deliver System Configuration/Data Acquisition Templates

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

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

### 2.B.1.3 Assist City with Populating Templates **\*\*City Involvement\*\***

The City will gather all datasets required to populate data acquisition templates and to configure the system. Our implementation advisors will work with the City throughout this process to collect and configure the following information:

- Defined Department-Specific Roles & Permissions
- Users (Username, Username, First Name, Last Name, Temporary Password etc.)
- Departments and Sub-Departments
- Work Order Types and Sub-Types (And additional Sub-Information)
- Service Request Types and Sub-Types (And additional Sub Information)
- Preventative Maintenance Schedules
- Vendors/Contractor Listing
- Parts and Materials Listing
- Inspection Processes

Any data not yet available can be entered into the system as needed by the City's Admin or Subject Matter Expert (SME) users. Documentation of the City's current Work Order, Service Request or Preventative Maintenance processes can also be delivered to our team to aid in the analysis process.

Throughout this task, and the remainder of time allotted to populating the system configuration/ data acquisition templates, our team will be available to advise the City and ensure all template-related questions are answered.

### 2.B.1.4 Completed Templates Delivered to PSD Citywide for Analysis

**\*\*City to provide\*\***

The City will provide completed templates to our project manager. The City can also post directly to Mavenlink (the project management software system we use).

### 2.B.1.5 Template Review Meeting **\*\*City Involvement\*\***

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

## 2.B.1.5 Establish Business Processes and Parameters to Support Maintenance Manager

Our team will provide a Business Process Report detailing process maps that illustrate the seamless integration of the newly acquired Maintenance Management system with the existing City business processes. The business processes will outline step-by-step procedures and workflows for utilizing the maintenance management system effectively, covering areas such as maintenance planning and scheduling, work order management, and reporting. The process maps serve as a visual guide, showcasing how the City Business processes can be optimized and streamlined.

### Milestone:

**Business Processes Review and Mapping Complete, Implementation Needs Analysis Complete**

## Stage 2.B.2 – Citywide Configuration & Integration Design, and Upload

| Key Outputs   | Key Outcomes   |
|---|--|
| <ul style="list-style-type: none"> <li>Meeting with IT/Integration stakeholders</li> <li>API library review for integrations with Fleetwatch, Clever Devices</li> </ul> | <ul style="list-style-type: none"> <li>Configurations and integrations further understood</li> </ul> |

### 2.B.2.1 Additional Review of City Processes **\*\*City involvement\*\***

After the kick-off meeting, we will schedule a meeting with the City's IT and Integration staff to review the required configuration and integration needs.

### 2.B.2.1 Design Configurations and API Library

City staff will be introduced to Citywide Software API library. With the API keys available in the library, integration of information from other systems is possible.

API Keys will be reviewed for use with:

- Fleetwatch,
- Clever Devices

### Milestone:

**Configuration and Design Determined for Integrations**

## Stage 2.B.3 – Test Plan Testing Scripts

| Key Outputs  | Key Outcomes   |
|--|--|
| <ul style="list-style-type: none"> <li>Step-by-step testing plan and scripts developed for the City</li> </ul> | <ul style="list-style-type: none"> <li>City will be able to complete UAT using our detailed testing plan and scripts.</li> </ul> |



### 2.B.3.1 Test Plan Development

The testing criteria/plan will be agreed to in conjunction with the City and will be used to ensure users can perform the items listed and are prepared for closing the configuration milestone. We will work with the City to finalize applicable functionality that will be tested based on the defined scope of work.

### 2.B.3.2 Provide Sample Test Plan Scripts

We will sample testing scripts that can be used by the City to demonstrate functionality of Citywide Maintenance Manager supports.

**Milestone:**

**System Test Plan Developed**

## Stage 2.B.4 – Citywide Configuration, Integration and Data Upload

| Key Outputs  | Key Outcomes   |
|--|--|
| <ul style="list-style-type: none"><li>• City data migrated into Maintenance Manager</li><li>• Data configuration</li><li>• Data review meetings</li><li>• Admin user training</li><li>• Process workshop</li></ul> | <ul style="list-style-type: none"><li>• All maintenance management data to be configured in Citywide Maintenance Manager</li><li>• Admin users are trained and can support system configuration and processes refinement</li></ul> |

### 2.B.4.1 Perform Initial System Upload and Configuration

We will upload all collected data and information into Maintenance Manager via the Upload Centre and begin the process of formatting data within the system.

### 2.B.4.2 Admin User Training **\*\*City Involvement\*\***

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

### 2.B.4.3 Process Workshop **\*\*City Involvement\*\***

This working session will involve our team working with City staff to set up workflow scenarios in the system, giving the City a better understanding of the software. This session can also include an analysis of end user training requirements. This task typically lasts one working session, with initial time allotted to preparation. To conclude, our project manager will develop and deliver a summary document detailing significant events/ circumstances that impacted the process analysis and workshop.

#### 2.B.4.4 Test and Refine Maintenance Manager Configurations **\*\*City Involvement\*\***

After City -supplied data has been formatted within Maintenance Manager to be in-line with City specifications, we will work with the City to test specific scenarios in the system as well as provide supplemental training and tutorials as needed.

#### 2.B.4.5 Supplemental Configuration Training **\*\*City Involvement\*\***

The Admin Training and Process Workshop will have provided the City admin and Subject Matter Expert (SME) users with a basic understanding of the system functionality and the administration of the core Work Orders and Service Requests functionality. During the configuration stage, additional admin and configuration training will continue in smaller manageable sessions. Depending on the project scope these training sessions may include:

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

#### 2.B.4.6 Finalize System Processes, Configurations & User Profiles

At this time, we will adjust and finalize Maintenance Manager processes, configurations, and user profiles. Our team will work alongside City staff to complete any refinement or modification efforts to transition to UAT.

### **Milestone:**

**Configuration, Integration and Data Upload Complete, Key Admin Users are Trained on Core Functionality**

### Stage 2.B.5 – Business Process and System Training

| Key Outputs  | Key Outcomes   |
|--|--|
| <ul style="list-style-type: none"><li>• Training Sessions and Materials</li><li>• Training Evaluation Survey and Summary of Survey Responses</li></ul> | <ul style="list-style-type: none"><li>• All City users are comfortable with the system</li></ul> |

#### 2.B.5.1 Maintenance Manager Training Needs Assessment and Preparation

Our Training Specialist will work with the City to identify training requirements and approaches which maximize staff understanding and use of the system. The result of the assessment will be a fully customized, City -approved Maintenance Manager training plan that will provide an overview of the anticipated training and will lead to the development of tailored training documentation such as schedules, agendas, and training presentation slides and handouts. This task can also be completed at project kick-off.

Training sessions will use a demo database that replicates the City's own software environment with City data to maximize training effectiveness and allow users to match familiar data to software functions.

### 2.B.5.2 Training Sessions

Training sessions will use a demo database that replicates the City’s own software environment with City data to maximize training effectiveness and allow users to match familiar data to software functions.

On-site training is available upon request, at an additional cost.

### 2.B.5.3 Training Evaluation Survey and Results Summary **\*\*City Involvement\*\***

After training, we will send a training evaluation survey to be completed by participants and will include responses in a summary document.

**Milestone:**

**All Users Trained and Comfortable with the System**

### Stage 2.B.6 – Maintenance Manager Testing Support

| Key Outputs   | Key Outcomes  |
|---|---|
| <ul style="list-style-type: none"><li>• Configurations finalized</li><li>• Training session for UAT</li><li>• Support during testing period</li></ul> | <ul style="list-style-type: none"><li>• Citywide Maintenance Manager module is fully usable</li></ul> |

#### 2.B.6.1 Training to Conduct UAT

We will host a workshop with the City’s test team to ensure that the team understands how to conduct UAT using

#### 2.B.6.2 Support During Testing

Our team will work with and support City staff in following a rigorous testing routine to test and refine system configurations. The Maintenance Manager implementation team will be available for questions, assistance, and additional training (if needed) during this time. We perform testing for administrative functions, preventative maintenance, service requests, and work orders, each with distinctive acceptance requirements.

During this stage of the project, the Maintenance Manager Database is in a test environment. All training and testing transactions can be removed prior to Go-Live. We can create a sandbox environment (copy) for testing and training.

**Milestone:**

**Maintenance Manager Testing Complete, City Sign-off on Testing**

### Stage 2.B.7 – Go-Live Support and Monitoring

| Key Outputs  | Key Outcomes   |
|--|--|
| <ul style="list-style-type: none"><li>• Direct support during Asset Manager go-live</li><li>• Transition to Citywide Support</li><li>• Stabilization support</li></ul> | <ul style="list-style-type: none"><li>• Fully functioning maintenance management planning software solution that will support City users in managing maintenance</li></ul> |

|  |  |
|--|--|
| <ul style="list-style-type: none"> <li>Phase 2.B. project close-out processes</li> </ul> |  |
|--|--|

### 2.A.6.1 Hands-On Assistance During Maintenance Manager Go-Live

Our project manager will be in direct contact with the City to facilitate our “one-click” go-live milestone, maintaining communication with staff. At this time, and immediately following go-live, our Maintenance Manager implementation team will be available for questions and assistance to ensure a smooth corporate transition to the use of Citywide Maintenance Manager.

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

### 2.A.6.2 Maintenance Manager Stabilization Support

Our team will provide the requested Stabilization support for a period of two months following go-live of the Citywide Asset Manager module.

### 2.A.6.3 Phase 2B Project Close-Out

Our Maintenance Manager project manager will compile key findings from the implementation and include them in a final project close-out report that will be presented to the City. The report can include an overview of key events and activities, significant variations, lessons learned, and recommendations for future steps the City can take to expand their use of Citywide.

Our project manager can host a close-out meeting to review the project report with City staff, or present key findings to stakeholders. Once the City has full access to Citywide Asset Manager, Phase 2B will be officially handed off to the City.

|                   |   |
|-------------------|---|
| <b>Milestone:</b> | <b>Citywide Maintenance Manager Fully Implemented</b> |
|-------------------|---|

## Phase 3 – Project Closure

### 3.1 Final Project Close-out Briefing

Our project manager can compile key findings from the Citywide Software implementation and include them in a final project close-out briefing. This report can include an overview of key events and activities, significant variations, lessons learned, and recommendations for future steps that can be taken to expand City use of the application.

## Summary and Review Meeting/ Project Closure **\*\*City Involvement\*\***

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

### **Milestone:**

**Citywide Maintenance Manager Fully Implemented,  
System Handed-off to City**

# Appendix B – Detailed References

This information is also included in the “Forms” section of this RFP response.

## Reference 1

|                                   |                                      |
|-----------------------------------|--------------------------------------|
| <b>Client Name:</b>               | City of Windsor                      |
| <b>Year(s) Services Provided:</b> | 01/2007 - 08/2023                    |
| <b>Address:</b>                   | 400 City Hall Square East, Suite 403 |
| <b>City, State Zip:</b>           | Windsor, Ontario, Canada<br>N9A 7K6  |
| <b>Contact Name:</b>              | Kathy Roeder, Asset Coordinator      |
| <b>Contact Phone and Fax:</b>     | (519) 225-6100 Ext. 6255             |
| <b>Contact Email:</b>             | kroeder@citywindsor.ca               |

### Brief Description:

The City of Windsor began working with PSD Citywide in 2007 with the acquisition of the Citywide Asset Manager software module, with the goal of building upon its existing asset management program to satisfy the PSAB 3150 requirements. The City now uses the software module to house their complete asset registry for financial reporting, and to track condition assessments and carry out risk modeling and lifecycle activities.

Starting in 2020, the City began a new project with PSD Citywide to implement the Citywide Maintenance Manager software module to use as their new customer service, work order, and operations management solution for their Parks Department. Our team completed a comprehensive implementation for the City that included working alongside City staff to set up service requests, work orders, and preventative maintenance within the system utilizing our proven implementation process. As a result of this project, the City’s Parks department can now create work orders and tag them directly to their assets located within Citywide Asset Manager. The system will allow the City’s Parks department users to manage all service requests and work orders from one system, assign work to staff through email notifications, track task completion, work with third-party contractors, and document inspections, among others key uses. The City of Windsor also downloaded the Citywide Mobile App, which will allow them to access their work orders in the field and prioritize/update activities in real time.

Following this acquisition, the City has begun work with our team to formalize asset management frameworks within their existing Citywide Asset Manager account and further implement the Citywide Capital Planning and Analysis (CPA) module.

### Key Positive Outcomes of the Project:

- The City was able to move from paper-based inspection forms to electronic tracking and scheduling of parks maintenance and inspections activity. This included playground inspections, life buoy Inspections, and parks & trails maintenance.
- Staff found the software easy to use which resulted in successful user adoption.

- Early on-site Admin Training helped to build strong subject matter expert (SME) knowledge.
- SMEs took control of testing and did in-house testing themselves in small groups after our team completed training, to help better facilitate the new software.

#### **Challenges Faced and Overcome Throughout the Project:**

- The project experienced complications related to COVID-19. The project initiation and initial Admin Training/ Testing the system experienced challenges as some key client contacts were in-office, some were only working alternate weeks, and others were redeployed throughout the implementation. To address this challenge, our assigned project team focused on staying the course and continuing to build the skills and knowledge of client key subject matter experts in a virtual environment.
- Parks were closed to the public and staff throughout much of the project, resulting in difficulty in scheduling testing for the inspectors, and requiring additional time to schedule training and go-live. To address this challenge, we worked with City staff to find innovative solutions, including working with some inspectors who completed test inspections in their backyards instead of a park.
- COVID presented challenges with training and learning opportunities. Staff who were expecting to be present together were unable to work together for knowledge transfer and coaching. We resolved this challenge by taking the following actions:
  - Moving all training from on-site to virtual, and by coordinating schedules for testing and training so that those who worked from home could participate.
  - Offering shorter training sessions to support scheduling concerns and recording training sessions for those users that were unable to attend the scheduled times.
  - Recording further small video tutorials and job aids for users to access on demand as they were getting comfortable with the system.
  - Running an extended pilot period as well as extending the go live support period from three weeks to two months. This helped the client resolve issues and further refine the configuration as needed.
  - Effectively utilizing weekly meetings, activity registers, issue logs, and our online Project Management Software help to keep everyone updated, aware of issue and task status.

## Reference 2

|                                   |   |
|-----------------------------------|---|
| <b>Client Name:</b>               | BC Parks, Ministry of Environment and Climate Change Strategy |
| <b>Year(s) Services Provided:</b> | 09/2019 – 08/2023   |
| <b>Address:</b>                   | PO BOX 9398 STN PROV GOV                                      |
| <b>City, State Zip:</b>           | Victoria, British Columbia, CANADA<br>V8W 9M9                 |
| <b>Contact Name:</b>              | Hilary Parry, Facility Officer - Capital Investment Program   |
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### Brief Description:

In 2019, the Ministry of Environment and Climate Change Strategy selected PSD Citywide through the RFP process to supply an Asset Management Software (AMS) solution. The project was completed for the two main branches of BC Parks: the Provincial Services Branch, responsible for setting policy, providing provincial direction, and managing provincial programs, and the Regional Operation Branch of BC parks, consisting of offices spread across five regions throughout the province with staff that provide support for asset management activities, such as performing inspections and asset data entry.

Over 260 provincial staff transitioned to the new comprehensive asset management system, utilizing a unique phased approach that involved system setup for a pilot group followed by a group of all other users. Each group received full setup, configuration, training, and support services, with the pilot troubleshooting and setting the stage for system setup for other users.

This significant undertaking required our consultants to provide full project management, including setup, consulting, configuration, training, and post-implementation support. Our lead consultant utilized the Prosci ADKAR change management methodology to measure project success criteria against overall rates of adoption and understanding on the part of participants, determined through training session feedback and continuous communication with staff members.

PSD Citywide staff also enabled organizational change and process enhancement by working with each cohort to determine which key business objectives were the most important to staff and their organization and clarified how we could adjust plans to ensure staff achieved a state of sustained and positive change. Our advisors also worked with staff to develop recommendations for building long-term asset management programs, including the establishment and enhancement of asset data systems, and the development of GIS and asset data management processes, as well as processes for the development of data management strategies.

PSD Citywide followed the Ministry's requested unique phase structure:



### **Phase 1 - Project Initiation & Planning**

Our team worked with key contacts to prepare and review the meeting agenda, confirm required attendees, determine logistics, and developing additional project documentation and artefacts and resource estimates for each phase.

### **Phase 2 – Work Analysis**

We worked with BC Parks staff to complete an extended work analysis phase split into two parts: 1) Work Analysis – Pilot Group, and 2) Work analysis – Remaining Groups. Timelines were adjusted accordingly based on internal deadlines and the results of system setup for the pilot group and how they would impact the group of all other users.

### **Phase 3 – System Configuration**

We completed system configuration for both the Asset Manager and Maintenance Manager components of the solution, as well as add-on modules and functionalities. This included the migration of all required asset data into the database, the configuration of the asset hierarchy and inventory, the configuration of work orders and inspections capabilities, and the configuration of GIS features for both the pilot groups and remaining groups.

### **Phase 4 – User Acceptance Testing**

Our team developed and executed a user acceptance testing (UAT) plan to validate that key business requirements were met by each module of the Citywide solution. This process instilled confidence in pilot users while using the new system, and then all other users prior to Go-live. The testing criteria/plan was agreed to by BC Parks and ensured that users could perform all key functions of the system.

### **Phase 5 - User Training and Go-Live**

This phase focused primarily on the remaining groups as previous pilot groups were trained in Phase 4 as part of system testing and final rollout. Each training session utilized a demo database that replicated the organization's existing Citywide database, which ensured that trainees were using familiar data in a recognizable software environment.

### **Phase 6 – Supplemental Training and Delivery of Project Documentation**

Due to the large size of the organization, our training and support specialists provided supplemental training for users of the system, which was open to and benefitted all users of the solution. Our team also developed Asset Locate documentation for the Maintenance Manager system and completed all internal reporting and review required for project close-out and project related support at this time.

### **Current Final Phase – Further Support and Project Closure**

The key Citywide Software implementation project is now complete, including all system configuration, training, user acceptance testing (UAT) and project sign-off.

Throughout the implementation, BC Parks began to realize their organization lacked the internal ability to enact the broader change and system uptake required for extended groups across their 7 large areas, each with its own operational regions. One example was the inability to

impose the use of the Maintenance Manager portion of the solution on offices maintained by contractors.

The organization therefore requested that PSD Citywide provide further support as they began a new initiative to further roll-out the solution to non-core staff, as well as facilitate full uptake of PSD Citywide's Enterprise GIS solution.

As a result, PSD Citywide is currently in the planning stages of a mass rollout of the Maintenance Manager and EGIS solution for non-core staff, and will close out this phase and start the first phase of the new initiative this year.

### **Challenges and Lessons Learned**

The main challenge faced throughout this project was related to data. BC Parks' asset data was not as sophisticated as anticipated which meant that the initial implementation scope and expectations had to be revised. Our data gap analysis assisted in identifying necessary data work moving forward. Through this renewed understanding, BC Parks began to improve data present in its Citywide Asset Manager software system through linking assets within its GIS system and asset management system and setting specific attribute data.

Another challenge faced throughout this implementation related to staff turnover. Key staff at BC Parks had left the organization, which required our team to determine new points of contact for the successful implementation of the system. We have change management processes in place and ensure cross training among PSD Citywide staff for all key roles, allowing our team to adopt to any changes. All training sessions can be recorded allowing our clients to prevent project knowledge loss if a new project member at the client organization leaves the organization.

Lastly, collecting data in the field, such as tracking work orders against some of their assets with the Citywide mobile application offline mode while in extremely remote areas of the province presented a challenge. Staff were very remote, in areas such as campsites, for several days at a time, which was a new and unique challenge faced. The Citywide mobile app does support offline mode, but very remote areas for prolonged lengths presented new challenges.

## Reference 3

|                                   |   |
|-----------------------------------|---|
| <b>Client Name:</b>               | County of Wellington                        |
| <b>Year(s) Services Provided:</b> | 04/2020 – 08/2023                           |
| <b>Address:</b>                   | 74 Woolwich Street                          |
| <b>City, State Zip:</b>           | Guelph, Ontario, Canada<br>N1H 3T9          |
| <b>Contact Name:</b>              | Andrea Brossault, Asset Manager Coordinator |
| <b>Contact Phone:</b>             | (519) 837-2600 Ext. 2291                    |
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### Brief Description:

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

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

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

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

Phase 2 has recently concluded additional departments and involves the implementation of parts and materials inventory management features, further report building within the system, the activation and implementation of Route Patrol functionality, the establishment of

Preventative Maintenance features for Fleet, and the implementation and integration of the Citizen Request Portal for Roads.

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

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

In May 2020, our advisors developed and delivered an Asset Management Program. The Asset Management Program delivered the following documents:

- Asset Management Strategy
- Condition Assessment Protocols
- Risk Analysis and Modelling
- Levels of Service Framework

The duration of this project took eight months. In December 2020, our team met with County staff to develop a customized levels of service framework. The initial presentation and discussion illustrated the importance of levels of service in an asset management program and the role that it should play in decision-making. The workshop was focused on developing meaningful levels of service statements, technical and customer levels of service that take into consideration the availability of data and the ability of these indicators to provide actionable data.

The workshops concluded with an interview of County staff on the various internal and external factors and trends that may affect their ability to provide expected levels of service in the future. The County staff identified extreme weather, aging infrastructure, growth and demographic shifts, fiscal capacity, and COVID-19 as key factors influencing service delivery.