SINGLE SOURCE AWARD **BID # SS-12557-22**

Subject: IBM Maximo Managed Support Services

Department: Information Technologies Division

Description of Purchase:

Recommend approval of Single Source Award to IHCS, Inc. D/B/A Maven Asset Management, Inc. for the purchase of IBM Maximo Management Support Services for the current and future version of IBM Maximo products. IBM Maximo is the City's Enterprise Asset Management System and provides critical integration with other systems such as MyJax, Fleet Management billing, 1Cloud ERP, EJ Ward, and Oracle HRMS System. Period of service will be for one (1) year from date of award. Total requested expenditure not to exceed $116,400.00.

Funding Source: 53101.113001.534100.000000.00000000.00000.0000000, to be executed by contract through Office of General Counsel and processed by purchase order release(s).

Single Source Award To: IHCS, Inc. D/B/A Maven Asset Management, Inc.

Price Justification: See Attached

Total Award: $116,400.00 **Requisition #** FAIT-501625-22

Attachments: Agency Memo, Single Source Form; Vendor Letter, Vendor Quote

Certification as to Single Source: Kenneth Lathrop, Chief of Information Technologies Division/CIO

THE ABOVE PURCHASE IS RECOMMENDED FOR AWARD IN ACCORDANCE WITH CHAPTER 126.206.

for **ANALYST: Ruben Ola**

Gregory Pease, Chief Procurement Division

APPROVAL OF GENERAL GOVERNMENT AWARDS COMMITTEE

"ALL AWARD ACTIONS SUBJECT TO LAWFULLY APPROPRIATED FUNDS"

CHAIRMAN ***DATE***

ACTION OF AWARDING AUTHORITY

DATE: _____

APPROVED _____ **DISAPPROVED** _____

OTHER _____

SIGNATURE OF AUTHENTICATION _____

FORM GB-114, Revised 12/2007

SS-12557-22

INFORMATION TECHNOLOGIES DIVISION

CITY OF JACKSONVILLE

DATE: April 8, 2022

TO: Greg Pease, Chief of Procurement Division

THRU: Kenneth E. Lathrop, Chief of Information Technologies / CIO

Kenneth E. Lathrop — Digitally signed by Kenneth E. Lathrop Date: 2022.04.13 13:04:22 -04'00'

FROM: Thomas Ossi, Technology Contract and Records Manager

THOMAS OSSI — Digitally signed by THOMAS OSSI Date: 2022.04.08 09:20:34 -04'00'

RE: **IBM MAXIMO MANAGED SUPPORT SERVICES – SINGLE SOURCE**

The Information Technologies Division (ITD), requests approval of a single source award to IHCS, Inc. D/B/A Maven Asset Management, Inc. for the purchase of IBM Maximo Managed Support Services for the current and future versions of IBM Maximo products. The supplier has successfully completed the IBM Maximo Upgrade version 7.6.0.9. which was awarded on bid ESC-0434-21.

ITD is currently in the process of upgrading the current version to 7.6.1.2. The supplier has the required skillset and technical knowledge to manage multiple integrations including, but not limited, to Fleet Management billing, 1Cloud, EJ Ward and Oracle HR. The supplier has the technical support and expertise required for our on-premise Maximo environments.

ITD Management recommends utilizing the supplier on a monthly fixed rate amount of $9,700.00 for IBM Maximo Managed Support Services for a one (1) year term.

The total not to exceed amount for the annual service is $116,400.00.

Tracy Geake — Digitally signed by Tracy Geake Date: 2022.04.13 09:35:48 -04'00'

FUNDING SOURCE: 53101.113001.534100.000000.00000000

Upon award approval, we will request a formal contract through the Office of General Counsel.

Your favorable consideration of ITD's request is appreciated.

Attachment: Maven Maximo Support Services

CC: Paul Freeman, Enterprise Applications Manager
Elizabeth Brown, IT Operations Manager
Mamta Gupta, Applications Development Project Manager
Andre Conyers, IT Contract Administrator

SINGLE SOURCE REQUEST

Pursuant to the City of Jacksonville Procurement Code § 126.206 & § 126.312, when requesting a purchase from a Supplier subject to the referenced sections, please complete this form to justify your request and submit to Procurement with applicable attachments

PROVIDE A SUMMARY OF THE SCOPE OF GOODS/SERVICES TO BE PROVIDED; IDENTIFY EACH ITEM, COMPONENT OR SERVICE BEING PROCURED (ATTACH QUOTE/PROPOSAL):

The Information Technologies Division (ITD) requests approval for a single source purchase of IBM Maximo Managed technical support services from IHCS, Inc. D/B/A Maven Asset Management, Inc. The rate per month will be $9,700.00, with the annual not-to-exceed amount $116,400.00 for the one year term. IBM Maximo is the City's Enterprise Asset Management System and provides critical integrations with other systems, such as MyJax, and customized workflows used by Public Works and Fleet Management.

PROVIDE A DETAILED JUSTIFICATION AS TO WHY THE REQUESTED GOODS/SERVICES CAN ONLY BE EFFICIENTLY AND EFFECTIVELY PROCURED THROUGH THE RECOMMENDED SINGLE SOURCE PROVIDER:

The internal resource that previously supported this system has retired along with their knowledge of the COJ configuration. Maven Asset Management is currently working with the City on the ongoing upgrade of the IBM Maximo to version 7.6.1.2. Thus, this supplier has the required knowledge and resources to support the City's multiple integrations for the Maximo software including, but not limited to: Fleet Management billing, 1Cloud ERP, EJ Ward, and the Oracle HRMS system. From their work on the upgrade, the supplier's technical support team has both the expertise and the familiarity with the City's various unique customer configurations to resolve application issues and errors. They have demonstrated that they can successfully manage the City's requirement of one production and three non-production environments. Any other company brought in while the upgrade is ongoing will decline to support the work that has been/is being done by Maven and thus cannot provide the support services that ITD and the end-user customers require. In addition, it would be extremely inefficient and ineffective to have two different vendors supporting the same system concurrently. Any new vendor brought in would have to learn about the system configurations by trial and error, which could take 4-6 months. This would effectively leave the City without support for this critical Enterprise system.

ASSERT THAT YOU HAVE RESEARCHED THE AVAILABILITY OF THE REQUESTED GOODS/SERVICES FROM OTHER SOURCES IN APPLICABLE MARKETS AND HAVE DISCUSSED AND EVALUATED THE SAME WITH COJ'S PROCUREMENT AND EBO DIVISIONS:

Although technical support services are available from other suppliers, the Managed Support Services can only be effectively provided by the supplier that was previously awarded for the competitively solicited IBM Maximo Upgrade Services and that is already familiar with the City's customized workflows and integrations system. The City previously purchased support directly from IBM, the creator of the software, however IBM no longer supports Maximo version 7.6.0.9.

SINGLE SOURCE REQUEST

Pursuant to the City of Jacksonville Procurement Code § 126.206 & § 126.312, when requesting a purchase from a Supplier subject to the referenced sections, please complete this form to justify your request and submit to Procurement with applicable attachments

PROVIDE A SUMMARY OF THE SCOPE OF GOODS/SERVICES TO BE PROVIDED; IDENTIFY EACH ITEM, COMPONENT OR SERVICE BEING PROCURED (ATTACH QUOTE/PROPOSAL):

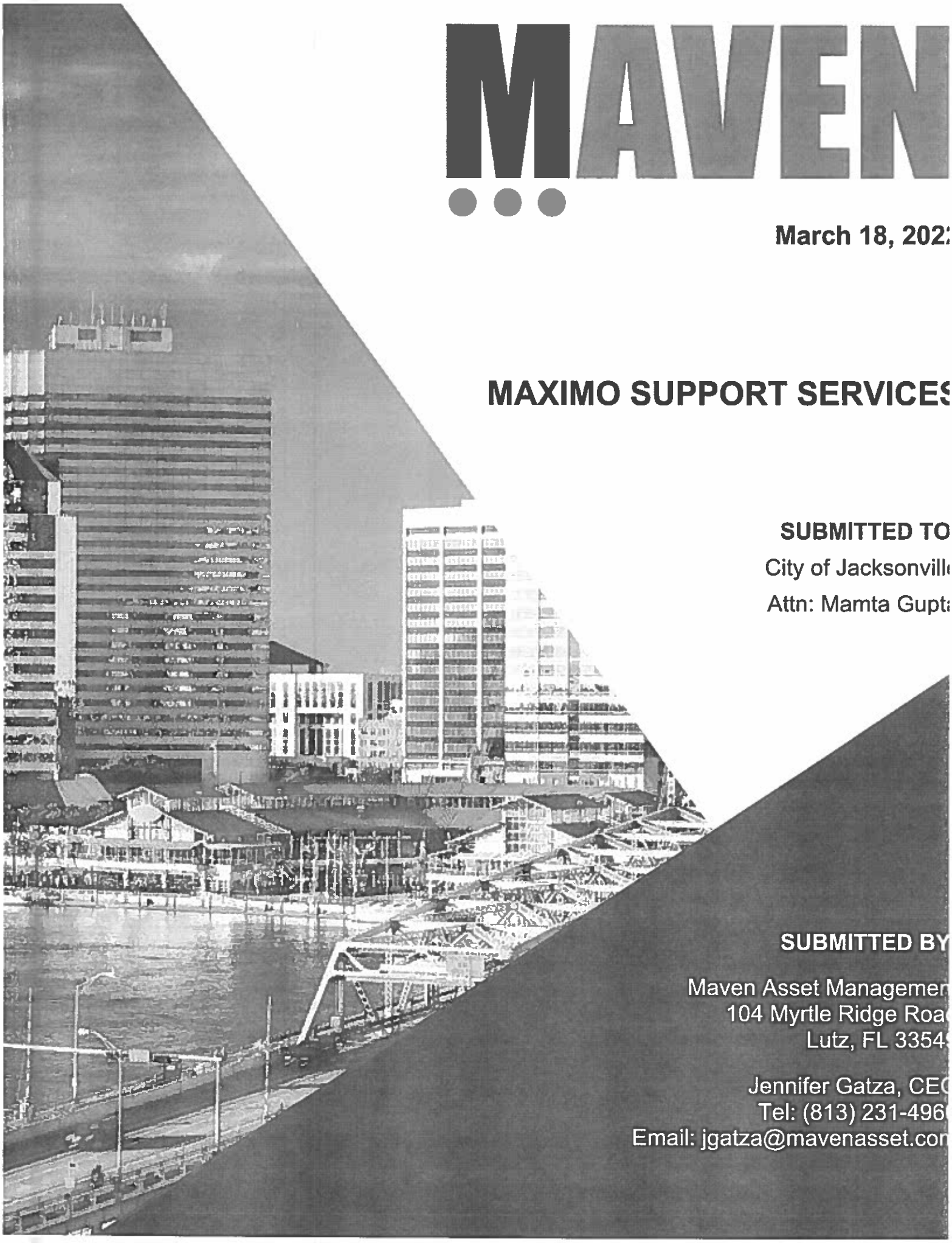
The Information Technologies Division (ITD) requests approval for a single source purchase of IBM Maximo Managed technical support services from IHCS, Inc. D/B/A Maven Asset Management, Inc. The rate per month will be $9,700.00, with the annual not-to-exceed amount $116,400.00 for the one year term. IBM Maximo is the City's Enterprise Asset Management System and provides critical integrations with other systems, such as MyJax, and customized workflows used by Public Works and Fleet Management.

PROVIDE A DETAILED JUSTIFICATION AS TO WHY THE REQUESTED GOODS/SERVICES CAN ONLY BE EFFICIENTLY AND EFFECTIVELY PROCURED THROUGH THE RECOMMENDED SINGLE SOURCE PROVIDER:

The internal resource that previously supported this system has retired along with their knowledge of the COJ configuration. Maven Asset Management is currently working with the City on the ongoing upgrade of the IBM Maximo to version 7.6.1.2. Thus, this supplier has the required knowledge and resources to support the City's multiple integrations for the Maximo software including, but not limited to: Fleet Management

ASSERT THAT YOU HAVE RESEARCHED THE AVAILABILITY OF THE REQUESTED GOODS/SERVICES FROM OTHER SOURCES IN APPLICABLE MARKETS AND HAVE DISCUSSED AND EVALUATED THE SAME WITH COJ'S PROCUREMENT AND EBO DIVISIONS:

Although technical support services are available from other suppliers, the Managed Support Services can only be effectively provided by the supplier that was previously awarded for the competitively solicited IBM Maximo Upgrade Services and that is already familiar with the City's customized workflows and integrations system. The City previously purchased support directly from IBM, the creator of the software, however



MAVEN

March 18, 202

MAXIMO SUPPORT SERVICES

SUBMITTED TO

City of Jacksonvill

Attn: Mamta Gupt

SUBMITTED BY

Maven Asset Managemen
104 Myrtle Ridge Roa
Lutz, FL 3354

Jennifer Gatza, CE
Tel: (813) 231-496
Email: jgatza@mavenasset.co

TABLE OF CONTENTS

MAXIMO SUPPORT SERVICES: MAVENCARE 1
SERVICE OPTIONS 2
Maximo Service Desk & Systems Administration 2
Additional Maximo Enhancement Development 4
Additional Consulting Services 5
SUPPORT RATES 5
TERMS & CONDITIONS 6

MAXIMO SUPPORT SERVICES: MAVENCARE

Whether you need 24x7 support or you want some specialized expertise from time to time, Maven has a support plan that's right for you. We serve as an extension of your IT department, working with your team to provide a unified, comprehensive solution for your users.

Gold Level Support

Our Gold package offers remote support for your Maximo environment during business hours. This package is excellent for teams with some Maximo administration expertise who would like to escalate more challenging issues to a dedicated Maximo team. It includes:

- A dedicated support manager
- Guaranteed response time during business hours
- Access to IBM Maximo-certified professionals
- Written knowledge base content for each issue that has been resolved
- After-hours remote emergency support*
- On-site support*

* Additional charges apply

Service Level Agreement

Maven is guided by two central principles: flexibility and proactivity. Flexibility means that Maven will adapt to the needs of our clients and the facts of each situation. Proactivity means that Maven will not wait to act; our goal is to prevent trouble, rather than simply responding to it.

In addition to responding to and resolving requests in a timely manner, Maven provides expedited support based on the priority of the request. Determination of the priority level of any issue, question or interruption would be determined by City of Jacksonville's ("the City's") point of contact. Once the circumstances are reviewed, Maven can suggest a change to this level, but any change must be approved by your point of contact. We have included an overview of our Service Level Agreement below.

Table 1: Service Level Agreement

Severity	Description of Level	Examples	Service Hours	Initial Response Time	Escalation
Urgent	Critical site-wide issues	Site-wide Maximo availability issue	24 X 7**	Less than 2 hours	To Director of Client Support after 4 hrs.
High	Affects production or daily use of Maximo for all users	Critical error message that client cannot correct through the Maximo applications	24 X 7**	Less than 2 hours	To Director of Client Support after 24 hrs.
Standard	User application support	Client has a "How do I..." question or needs new user added	Normal Business Hours	Less than 1 business day	To Director of Client Support after 72 hrs.
Enhancement or Customization	Requested enhancement or customization	Examples are hot fix and patch installations and significant changes to the Maximo instance configuration	Normal Business Hours	Less than 1 business day	Prioritized on case-by-case basis

SERVICE OPTIONS

Maven offers fully-managed services for Maximo and supporting systems, including WebSphere and SQL Server. We will provide a dedicated account manager and primary support contact to ensure consistent support that is tailored for City of Jacksonville. As needed, other consultants will support your primary support team for specialized needs and/or for supplemental after-hours support.

MAXIMO SERVICE DESK & SYSTEMS ADMINISTRATION

Maven's Maximo Service Desk and Systems Administration services allow organizations to outsource common Maximo support and service desk activities. This support level includes:

- End user requests: Maven will be responsible for interacting either with your IT team or directly with end users to resolve Maximo-related requests, including technical, functional, and usability support.
- Server and infrastructure issues: Maven will be responsible for managing the Maximo application server and its connections to the underlying database and Active Directory authentication
- Interface and data feed management: Maven will monitor all interface and data feed touchpoints, resolving disruptions proactively where applicable

- Manage user accounts within license terms (create, modify, deactivate)
- Manage security groups to meet user needs while maintaining license compliance
- Manage labor, calendar, and financial period data in Maximo
- Run year-end rollups (asset cost, inventory cost, labor cost, etc.)
- Manage improvement / enhancement requests
- Manage Organization and Site settings (costing methods, work order edit settings, PM work order generation, etc.)
- Manage Cron tasks
- Conduct an annual review of license usage and suggest optimizations

Maven will also support technical common Maximo requests for the City, up to five (5) requests per month, including:

- Provide support for the following one-off application changes:
    - Single-field screen changes per month in accordance with specifications provided by the City
    - Add domain values (pre-defined Maximo lists, such as Work Order status) in accordance with customer provided specifications in a mutually agreed-upon specification template format
    - Perform the following database configuration tasks as needed in support of the Maximo instance:
        - Creating database attributes
        - Modifying object structures to support data extracts
        - Updating views in Database Configuration
        - Creating or updating relationships between parent and child tables
        - Managing database indexes
    - Provide minor modification to Start Centers per City specifications
    - Provide minor modifications to KPIs per City specifications
- Manage and support saved queries and Query-Based Reports (QBR)
- Minor solutioning, troubleshooting, best-practice guidance, or education
- Investigate and resolve or escalate application issues/errors*
- Investigate and resolve or escalate infrastructure issues*

Maven will support the City's on-premises Maximo environments, including one production and three non-production systems, as follows. Maven will conduct Maximo and WebSphere patching requests up to three (3) times per year, including:

- Install, test, and deploy application updates and IBM fixes
- Manage the relationship with IBM for product support and bug fixes

* Maven will escalate IBM software bugs or IT infrastructure issues appropriately and will manage the communications and resolution process directly with IBM. These patching requests do not include version upgrades to Maximo or WebSphere.

At Maven's sole discretion, requests not included in the above list may be performed under this agreement, with no additional service charges, if the requested service requires less than two (2) hours of support.

Advanced Requests

The City will be the first point of contact for more advanced support requests with their users and will work with Maven on these Maximo-related requests. Maven will provide up to three (3) advanced support requests per month, including:

- Minor automation script troubleshooting, creation, or adjustment
- Advanced Maximo User Interface updates or requests
- Workflow troubleshooting, creation, or adjustment
- Minor bulk data updates
- In-depth solutioning, troubleshooting, best-practice guidance, or education
- Conditional Expression configuration
- Report development & modifications
- Data extract design and development
- New KPI and Start Center development

At Maven's sole discretion, additional requests not included in the above list may be performed, with no additional service charges, if the requested service requires less than four (4) hours of support.

Maven provides Maximo support based on the anticipated volume of requests from City customers. This plan includes an average of up to **30 requests per month.** Maven and the City will work together to prioritize issue resolution within this scope.

The City will be responsible for confirming requests directed to Maven are Maximo-related and covered under this support agreement. The City will provide full administrator-level access to systems, information, and resources to perform support services that are requested of Maven.

ADDITIONAL MAXIMO ENHANCEMENT DEVELOPMENT

Application development services beyond the scope of the above support agreement are available on a time and materials basis. Such development services may include:

- Automation script development
- Workflow development
- Conditional expression configuration
- Report development & modifications
- Data extract design and development
- New KPI and Start Center development

Maven will provide a level of effort estimate for all development work and request client authorization before proceeding. Maven will not exceed estimated development quotes without written approval from a client-authorized approver. Consultants will adhere to the City's quality and change control policies.

Enhancement development services are provided according to the rate table listed below, under *Consulting Service Rates.* As a Maven support client, the City is entitled to preferred rates.

ADDITIONAL CONSULTING SERVICES

Maximo consulting services beyond the scope of the above support agreement are available on a time and materials basis. Maven will provide expert-level guidance Enterprise Asset Management (EAM) within Maximo, tailoring industry standards to meet the City's unique needs in the areas of work management, asset management, inventory management and procurement. Services include:

- Informal how-to training and coaching sessions
- Process improvement recommendations (e.g., PM optimization, inventory management)
- Data quality management
- Support for EAM program improvement

Maven will provide a level of effort estimate for all consulting work and request client authorization before proceeding. Maven will not exceed estimated service quotes without written approval from a client-authorized approver. Consultants will adhere to the City's quality and change control policies.

Consulting services are provided according to the rate table listed below, under *Consulting Service Rates.*

SUPPORT RATES

Maven provides Systems Administration Support as a fixed-rate service, paid per month with a six month commitment. All rates are listed in USD.

Service	Cost/month
Maximo Service Desk & Systems Administration	$9,700

Consulting Service Rates	Rate/hr. Preferred*
Maximo Development	$145
Maximo Consulting Services	150
Maintenance Project Management	150

After-hours emergency support is available for a surcharge of $500 USD plus $50 USD/hour. Business hours are defined as 7 AM – 7 PM EST.

* Preferred: Rates offered to clients under a Systems Administration support agreement, as well as for enhancements requiring over 200 service hours in a six-month period.

TERMS & CONDITIONS

All support provided by Maven to non-Maximo components, including but not limited to interfaces, WebSphere and databases are only to be provided to those components directly related to Maximo.

Maven requires access to the following systems to satisfy the requirements of this SOW:

- VPN/remote access credentials permitting access to each of the below services
- Maximo: maxadmin access
- WebSphere: wasadmin access and service account details
- SQL Server – Maximo database only: dbo
- Remote desktop access to the application servers hosting WebSphere/Maximo
- Remote access to the database server permitting execution of SQL queries
- Active directory: Bind distinguished name credentials for Maximo to query AD
- Connection details for each integration between Maximo and external systems
- Access to the City's service desk system, if applicable

All support offerings are governed by Maven's Master Terms and Conditions.

From:	Geake, Tracy
To:	ITDADMIN
Cc:	Ossi, Thomas; Brown, Elizabeth; Conyers, Andre; Freeman, Paul
Subject:	FW: IBM Maximo | Managed Support Services | Quote Attached
Date:	Wednesday, April 13, 2022 2:06:04 PM
Attachments:	SINGLE SOURCE REQUEST FORM - IBM Maximo Managed Support Services 4-7-2022 revEB.pdf City of Jacksonville - Maximo Support Services.pdf IBM MAXIMO MANAGED SUPPORT SERVICES - Single Source Procurement Memo 04-8-2022 .pdf

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Tracy Geake
IT Finance Manager
City of Jacksonville | Information Technologies Division
214 N. Hogan St. 9th Floor
Jacksonville, Florida 32202
Office: (904) 255-8103
Cell: (904) 763-4049
www.coj.net

From: Lathrop, Kenneth <LATHROP@coj.net>
Sent: Wednesday, April 13, 2022 1:05 PM
To: Geake, Tracy <TGeake@coj.net>
Cc: Ossi, Thomas <TOssi@coj.net>; Brown, Elizabeth <ElizabethB@coj.net>; Conyers, Andre <AConyers@coj.net>; Freeman, Paul <PFreeman@coj.net>
Subject: RE: IBM Maximo | Managed Support Services | Quote Attached

Signed.

From: Geake, Tracy <TGeake@coj.net>
Sent: Wednesday, April 13, 2022 9:39 AM
To: Lathrop, Kenneth <LATHROP@coj.net>
Cc: Ossi, Thomas <TOssi@coj.net>; Brown, Elizabeth <ElizabethB@coj.net>; Conyers, Andre <AConyers@coj.net>; Freeman, Paul <PFreeman@coj.net>
Subject: FW: IBM Maximo | Managed Support Services | Quote Attached
Importance: High

Good Morning Ken –

For your approval and signature.

Thanks.
Tracy Geake
IT Finance Manager
City of Jacksonville | Information Technologies Division

214 N. Hogan St. 9th Floor
Jacksonville, Florida 32202
Office: (904) 255-8103
Cell: (904) 763-4049
www.coj.net

From: Ossi, Thomas <TOssi@coj.net>
Sent: Friday, April 8, 2022 9:26 AM
To: Geake, Tracy <TGeake@coj.net>
Cc: Brown, Elizabeth <ElizabethB@coj.net>; Conyers, Andre <AConyers@coj.net>; Freeman, Paul <PFreeman@coj.net>
Subject: FW: IBM Maximo | Managed Support Services | Quote Attached
Importance: High

Hi Tracy,

Please find attached the IBM Maximo Managed Support Services memo with the Single Source Request Form.

Sincerely,

Tom

From: Brown, Elizabeth <ElizabethB@coj.net>
Sent: Thursday, April 7, 2022 4:42 PM
To: Ossi, Thomas <TOssi@coj.net>
Cc: Freeman, Paul <PFreeman@coj.net>; Conyers, Andre <AConyers@coj.net>; Gupta, Mamta <MGupta@coj.net>
Subject: RE: IBM Maximo | Managed Support Services | Quote Attached

Tom,

I have no suggested changes to the memo.

I did rearrange the information a bit on the single source form. *Thank you*

Let me know what you think..

Thank you,

Elizabeth Brown
IT Operations Manager
Office: 904.255.8199
Cell: 904.652.9186

From: Ossi, Thomas <TOssi@coj.net>
Sent: Thursday, April 7, 2022 4:01 PM
To: Gupta, Mamta <MGupta@coj.net>; Brown, Elizabeth <ElizabethB@coj.net>; Ossi, Thomas <TOssi@coj.net>
Cc: Freeman, Paul <PFreeman@coj.net>; Conyers, Andre <AConyers@coj.net>
Subject: RE: IBM Maximo | Managed Support Services | Quote Attached

All –

Please find attached the single source form and the single source procurement memo for your review.

Thank you for your assistance,

Tom

From: Gupta, Mamta <MGupta@coj.net>
Sent: Monday, March 21, 2022 12:21 PM
To: Brown, Elizabeth <ElizabethB@coj.net>; Ossi, Thomas <TOssi@coj.net>; Conyers, Andre <AConyers@coj.net>
Cc: Lathrop, Kenneth <LATHROP@coj.net>; Freeman, Paul <PFreeman@coj.net>; Geake, Tracy <TGeake@coj.net>
Subject: FW: IBM Maximo | Managed Support Services | Quote Attached

Good afternoon, Elizabeth & team,

Attached is the quote that was received from Maven on Friday (3/18). This vendor will work as a Maximo helpdesk and provide support to all tickets including 11 integrations (will run monthly billing also). The cost is $9,700 per month ($116,400) per year.

Please review & let us know what is needed to begin the Single Source process.

Thank you,
Mamta Gupta
255-8038

From: Gupta, Mamta
Sent: Tuesday, March 1, 2022 4:26 PM
To: Jennifer Gatza <jgatza@mavenasset.com>
Cc: Freeman, Paul <PFreeman@coj.net>; Brown, Elizabeth <ElizabethB@coj.net>; Ossi, Thomas <TOssi@coj.net>; Conyers, Andre <AConyers@coj.net>

Subject: IBM Maximo | Managed Support Services

Hi Jennifer,

Back in June, we had received the attached quote from Maven regarding the Support Services. We wanted to ask if that quote still holds good. Please also take a look at the attached requirements and provide us the updated quote ASAP if there is any change.

Thank you

Mamta Gupta
Applications Development Project Manager
City of Jacksonville | Information Technologies Division
214 N. Hogan Street
Jacksonville, FL 32202
Office: 904.255.8038
Cell : 904-323-6002
www.coj.net

From: Jennifer Gatza <jgatza@mavenasset.com>
Sent: Monday, June 21, 2021 8:16 AM
To: Gupta, Mamta <MGupta@coj.net>
Subject: Re: Maximo Upgrade Proposal

EXTERNAL EMAIL: This email originated from a non-COJ email address. Do not click any links or open any attachments unless you trust the sender and know the content is safe.

Hi Mamta,

I have attached a Maximo support proposal for your review. We are very flexible in the scope of support services; please reach out with any questions or concerns.

Jennifer

Jennifer Gatza / CEO
Direct: 813-563-4154 / Mobile: 813-335-6242 / jgatza@mavenasset.com

Maven Asset Management, Inc. Office: 813-231-4690 / Fax: 978-231-4690
104 Myrtle Ridge Road, Lutz, FL 33549
http://www.mavenasset.com