6

SINGLE SOURCE AWARD **BID # SS-14276-23**

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, the Maximo upgrade from 7.6.1.2 to 7.6.1.3, and the Maximo Application Suite Upgrade Assessment. Period of service will be from June 1, 2023 through May 31, 2024. The requested total expenditure not to exceed $150,892.00.

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

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

Price Justification: See Attached

Total Award: $150,892.00 **Requisition #** FAIT-500512-23

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.

ANALYST: Ruben Ola

Dustin Freeman, 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

City of Jacksonville, Florida

Lenny Curry, Mayor

Information Technologies Division
Ed Ball Building
214 N. Hogan Street, Suite 900
Jacksonville, Florida 32202

ONE CITY. ONE JACKSONVILLE.

May 2, 2023

TO: Dustin L. Freeman
Chief of Procurement Division

VIA: Patrick "Joey" Greive
Director of Finance and Administration / CFO

Patrick Greive — Digitally signed by Patrick Greive Date: 2023.05.16 12:48:01 -04'00'

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

Kenneth E. Lathrop — Digitally signed by Kenneth E. Lathrop Date: 2023.05.09 14:38:53 -04'00'

FROM: Paul Freeman
Enterprise Applications Manager

Paul Freeman — Digitally signed by Paul Freeman Date: 2023.05.08 09:46:49 -04'00'

SUBJECT: **Single Source Award Request - IBM Maximo Managed Support Services**

The Information Technologies Division (ITD) is requesting 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, the Maximo upgrade from 7.6.1.2 to 7.6.1.3, and the Maximo Application Suite Upgrade Assessment.

ITD Management recommends utilizing the supplier on a monthly fixed rate amount of $9,991.00 with an annual cost of $119,892.00. Also, a one-time upgrade fee of $6,200.00 for the upgrade to 7.6.1.3., and $24,800.00 for the Maximo Application Suite Upgrade Assessment. The period of coverage will begin June 1, 2023, through May 31, 2024.

The not-to-exceed amount for this award will be $150,892.00.

Tracy Geake — Digitally signed by Tracy Geake Date: 2023.05.08 14:29:48 -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.

Attachments: Single Source Justification
Supplier Quote/Supplier Single Source Letter

CC: Elizabeth Brown, IT Operations Manager
Thomas Ossi, Technology Contract and Records Manager
Andre Conyers, IT Contract Administrator

JUSTIFICATION FOR SINGLE SOURCE (JSS)

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

1. Requesting Agency:	Information Technologies
2. Nature and/or description of the requirement being requested. ***Identify each item, component or service being procured. (Attach quote/proposal):*** ***Why does the City need these particular goods or services?***	The Information Technologies Division (ITD) is requesting a Single Source Award for the purchase of IBM Maximo Managed Support Services, the Maximo upgrade from 7.6.1.2 to 7.6.1.3, and Maximo Application Suite Upgrade Assessment with IHCS, Inc. D/B/A Maven Asset Management, Inc. The monthly fixed rate amount for the Support Services is $9,991.00 with an annual cost of $119,892.00. Also, a one-time upgrade fee of $6,200.00 for the upgrade to 7.6.1.3., and $24,800.00 for the Maximo Application Suite Upgrade Assessment. The not-to-exceed amount will be $150,892.00.
3. Provide a detailed justification as to why the requested goods/services can only be efficiently and effectively procured through the recommended Single Source vendor:	Maven Asset Management (Maven) provides prioprietary tools and monitoring capabilities as a managed service for IBM Maximo users. Further, as the organization who developed the City's Maximo automation processes, Maven possesses specialized expertise to maintain the Maximo system that is not available via any other vendor.
4. Date of Request	04/28/2023

5. Summary of Market Research

[Provide a description of the market research performed, how it was performed, by whom, and market research results. Please spell out acronyms.]

[Support Services can only be effectively provided by the supplier that was previously awarded (IHCS, Inc. dba Maven Asset Management, Inc.) for the competitively solicited IBM Maximo Upgrade Services and that is already familiar with the City's customized workflows and integrations system.]

6. Other Documentation (Check and attach all that apply)

√ Supplier Quote

√ Single Source Memo signed by Director

☐ **Other** [Click here to list other documentation.]

MAVEN

April 24, 2023

Andre Conyers
IT Contract Administrator
City of Jacksonville/Information Technologies Division
214 N. Hogan Street, 9th Floor
Jacksonville, Florida 32202

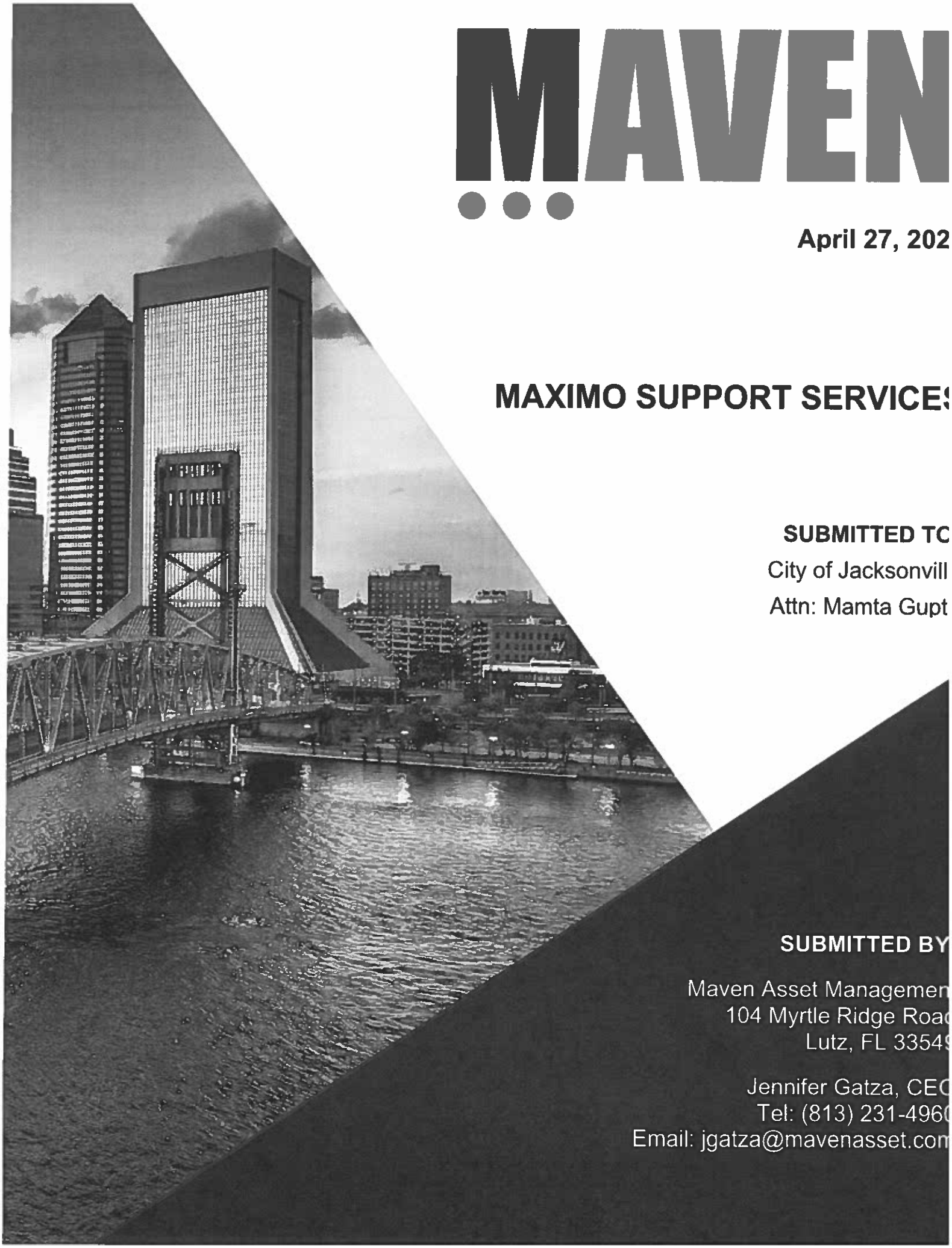
RE: MavenCare Managed Services for IBM Maximo

Dear Mr. Conyers,

Maven Asset Management (Maven) provides prioprietary tools and monitoring capabilities as a managed service for IBM Maximo users. Further, as the organization who developed the City's Maximo automation processes, Maven possesses specialized expertise to maintain the Maximo system that is not available via any other vendor.

For additional information, please contact me using the email or phone number listed below. We appreciate the opportunity to work with you.

Jennifer Gatza, CEO
jgatza@mavenasset.com
(813) 563-4154



MAVEN

April 27, 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.com

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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 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.

UPGRADE TO MAXIMO 7.6.1.3

IBM has indicated that as of **December 31, 2023**, interim fixes will only be released for Maximo 7.6.1.3. Maven recommends for the City to upgrade the Maximo system from 7.6.1.2 to 7.6.1.3 to ensure that critical defects and security vulnerabilities will be addressed by IBM and available for patching after this date.

Maven will support the City of Jacksonville in an upgrade of the Maximo system to 7.6.1.3. City of Jacksonville will maintain responsibility for all coordination, end-user testing and related testing support. Maven will be responsible for the technical portions of the upgrade.

Prior to deployment to the Production environment and to minimize any negative impacts to the Production environment, the City will provide Maven with evidence of end-user testing and their acceptance of the upgrade. Maven has provided testing framework documentation that

would be completed by the end-users. Any issues resulting from the upgrade will be handling according to the request policies above.

TIVOLI ARCHITECTURE PLANNING

IBM has indicated that as of **September 30, 2025**, fixes, patches, and telephone support will no longer be provided for Maximo 7.6.1.x and its corresponding components and add-ons of the same version.

Due to IBM changing the licensing and system architecture in the next version of Maximo, Maven recommends that the City perform a MAS Assessment to be positioned to make decisions related to the end-of-support decision by IBM and how City environments are impacted.

MAXIMO APPLICATION SUITE UPGRADE ASSESSMENT

Maven will work with the appropriate City resources to review and understand how new features in the Maximo Application Suite will be used within the City to ensure needs are met and that City resources understand where this new functionality can be used to improve overall operations. We will also review the available data in Maximo 7.6.x and identify where improvements to the data can be made to support better reporting and decision-making. Maven will review the following with the City to develop a path to the Maximo Application Suite:

- Business Process that the City would like to improve
- Current Maximo Environments
    - Number of Environments (Dev, Test, QA, Prod)
- Database Type
    - User Database Access
    - Database Views/Triggers
- Industry Solutions being used
- Add-Ons being used
- Integrations
    - Type of Integration
    - One-Way or Two-Way
    - How the integrations are enabled
- Attachments
- Customizations, including Java Customizations

    - Determine if Java customization can be replaced with out-of-box features or automation scripts

- Screen changes
- Automation scripts
- Workflows
- 3rd Party Products

- Security Requirements

    - SSO Requirements

- User Interface Changes
- Browser Support (Edge, FF, Chrome)
- Mobile Use and Requirements
- Reports – Identity what reporting tools are used and determine reporting strategy

    - Review if/how Cognos can be deployed as part of the reporting strategy

- Data Quality

    - Review data for completeness and quality
    - Determine if there are changes to the data that would improve reporting and decision making
    - Run Data Integrity Checker

- New MAS Features
- New MAS Products

    - Monitor
    - Health
    - Safety
    - Assist
    - Visual Inspections

- Training Requirements and current Materials

    - Type of Training - End User, Train the Trainer
    - Method of Training - Video, Virtual, Classroom
    - MAS Admin Training
    - Determine changes in skills based on new MAS architecture

- Test Plan/Quality Management Plan
- Performance Requirements

- Timing Requirements
- Hosting options
- Change Management options
    - Responsibilities
    - Communications
    - Ownership

It is expected that Maven will have access to the following in support of the MAS Assessment:

- Any available system documentation
- Configuration & reports
- Process diagrams & SOPs

- Training guides
- Test scripts
- Access to the current system where necessary

At the conclusion of the assessment, Maven will prepare a MAS Assessment Report which will include recommendations for the approach to the upgrade to MAS based on the above analysis.

If the assessment is to be performed on-site, the City will provide the Maven resources with a workspace and necessary network connection. Maven understands that key personnel from the City will be available for interviews and data-gathering purposes.

Maven will conduct the assessment remotely over a three-week period with a combination of resources for the assessment and to complete the assessment report.

The report will be delivered to the City within three weeks of completion of the assessment and a time will be scheduled to review the report with the appropriate personnel.

Deliverables

- *List of customizations and configurations in the current Maximo 7.6.x system that will need to be available in MAS*
- *List of customizations in Maximo 7.6.x that may be replaced with out-of-the-box functionality in MAS*
- *List of reports that will need to be upgraded to the MAS reporting tool*
- *Identification of integrations that will be needed in MAS*
- *Licensing changes from the current structure to application points and costs associated with the change*
- *Hosting options and cost impact*
- *New MAS features and functionality that will be used*
- *Estimated level of effort for an upgrade to MAS including new features and functionality*

- *Technical Upgrade*
- *Technical Upgrade with process optimization*

- *High-Level schedule to upgrade to MAS*
- *High-Level ROI information to support cost justification of upgrade*

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	Cost/year
Maximo Service Desk & Systems Administration	$9,991	$119,892

Additional Server Option	Grand Total
Maximo upgrade from 7.6.1.2 to 7.6.1.3	$6,200

Tivoli Architecture Planning	Grand Total
Maximo Application Suite Upgrade Assessment	$24,800

Consulting Service Rates	Rate/hr. Preferred*
Maximo Development	$155
Maximo Consulting Services	160
Maintenance Project Management	160

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.