

CLACKAMAS COUNTY BOARD OF COUNTY COMMISSIONERS

Policy Session Worksheet

Presentation Date: August 22, 2017 **Approx. Start Time:** 11:00 AM **Approx. Length:** 30 min

Presentation Title: Building Information and Asset Management Software System

Department: Facilities Division of Finance

Presenters: Jeff Jorgensen & Cory Johnson, Facilities; Patricia Bride, Procurement

Other Invitees: Christa Wolfe & Marc Gonzales, Finance; Laurel Butman, County Administration

WHAT ACTION ARE YOU REQUESTING FROM THE BOARD?

Staff is requesting approval to declare an intent to award a contract to Accruent for asset management software as best for the public good of the County for facilities planning and management.

EXECUTIVE SUMMARY:

The Board of County Commissioners as well as County departments are interested in having an overarching master plan for county facilities which includes an assessment of the condition of county facilities and a sustainable funding plan. Staff identified procurement of an asset management software system as a prerequisite for ongoing condition assessment and funding development. The Board designated \$200,000 for this purpose in 2015.

After two years of collaborative work across County departments, the multi-departmental team is recommending the County purchase the Accruent software product for tracking all aspects of County facilities management.

Accruent met department developed specifications for ease of use, multiple necessary functions, unlimited user access, mobile options and much more. Though the system was scored second of the four finalists by the procurement review subcommittee, feedback from demonstrations conducted across all interested departments and the costs presented clearly point to Accruent as superior in its ability to meet the diverse needs across the County. The cost of the top scoring Infor itself was prohibitive, making the purchase of Accruent the best choice for the public good. A full report of the selection process and comparison of the finalist vendors is in Attachment A and the evaluation committee's recommendation and discussion are in Attachment B.

FINANCIAL IMPLICATIONS (current year and ongoing):

Is this item in your current budget? YES NO

What is the cost? \$See Attachment A

What is the funding source? Initial startup: General Fund; Ongoing costs: Allocation

STRATEGIC PLAN ALIGNMENT:

1. How does this item align with your Department's Strategic Business Plan goals?
This item aligns with Facilities Management's goal to develop a long term maintenance plan for County facilities including an assessment of the condition of County facilities and the funding requirements.
2. How does this item align with the County's Performance Clackamas goals?

This item aligns with the Performance Clackamas goal of Building a Strong Infrastructure by having an overarching long-term plan for county facilities which includes an assessment of the condition of county buildings and a funding plan.

LEGAL/POLICY REQUIREMENTS:

The County is required to list all facilities assets in its Comprehensive Annual Financial Report (CAFR) and the Board has established goals for long-term facilities planning and funding.

PUBLIC/GOVERNMENTAL PARTICIPATION:

This is an internal project meant to serve all County departments and agencies with comprehensive information. About 10 County departments were involved in all aspects of planning for this software procurement by participating in demonstrations, on the procurement team, and/or ongoing planning.

OPTIONS:

1. Approve Accruent as the best vendor for the public good for an asset management software solution for County owned and managed facilities and direct staff to negotiate and execute a contract for services.
2. Request additional information prior to approving a vendor.
3. Approve a different vendor from the available finalists.
4. Determine it is not in the County's best interest to procure an asset management system and reject all bids at this time.

RECOMMENDATION:

Staff respectfully recommends that the Board choose Option #1 and direct staff to issue a notice of intent to award and execute a contract with Accruent for a County asset management system.

ATTACHMENTS:

1. Attachment A: Project Summary
2. Attachment B: Committee Recommendation for Award

SUBMITTED BY:

Division Director/Head Approval Jeff Jorgensen
Department Director/Head Approval Marc Gonzales
County Administrator Approval Laurel Butman

For information on this issue or copies of attachments, please contact Cory Johnson @ 503-557-6422.



Building Information and Asset Management System

July 27, 2017

Project Briefing

Objective

Prior to making a formal vendor selection; it was deemed to be prudent to review the project, initial start-up/implementation costs, and ongoing annual fees. As you will see in this project briefing, there are significant differences in the two (2) finalist pricing which brings into question ongoing annual fees; as well as, how those fees will be distributed among the end-user departments and implementation costs.

Background

During the Fiscal Year 2015-2016 Budget Committee session, it was requested by the Budget Committee to provide future lifecycle cost of County buildings beyond the upcoming new fiscal year. Facilities Management was not able to provide that information because the current system does not track that information. The Board of County Commissioners shortly thereafter, requested a list of all County own buildings and properties from Facilities Management. Prior Boards and County Administration had requested the same information.

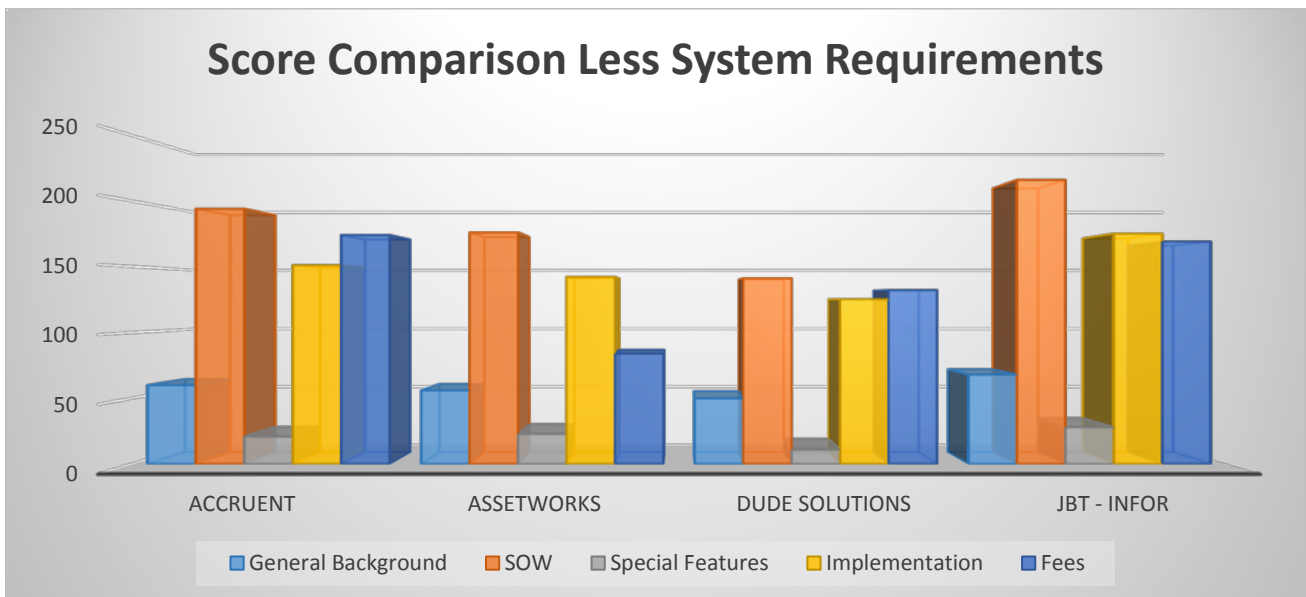
Facilities Management was able to provide a small list of buildings and properties. At that time, there was no common resource to capture that data. Each department that has buildings or property assigned to it track the information using their own unique systems.

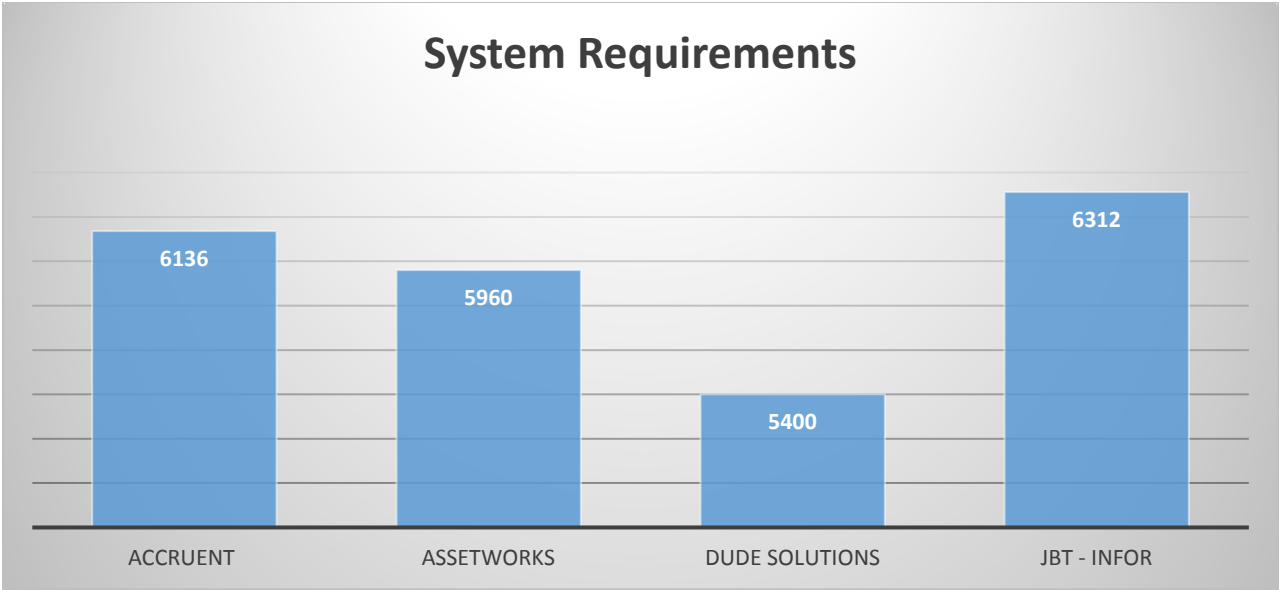
As a result, the Board of County Commissioners provided \$200,000 to purchase a system that would be able to track all buildings and properties owned and operated by the County as well as calculate future lifecycle cost for these locations. This new system would be managed by Facilities Management and would be a resource that would provide information to the Board of County Commissioners regarding the County's buildings and properties.

Sense these monies were provided, an RFP has been conducted and several potential solutions have been evaluated.

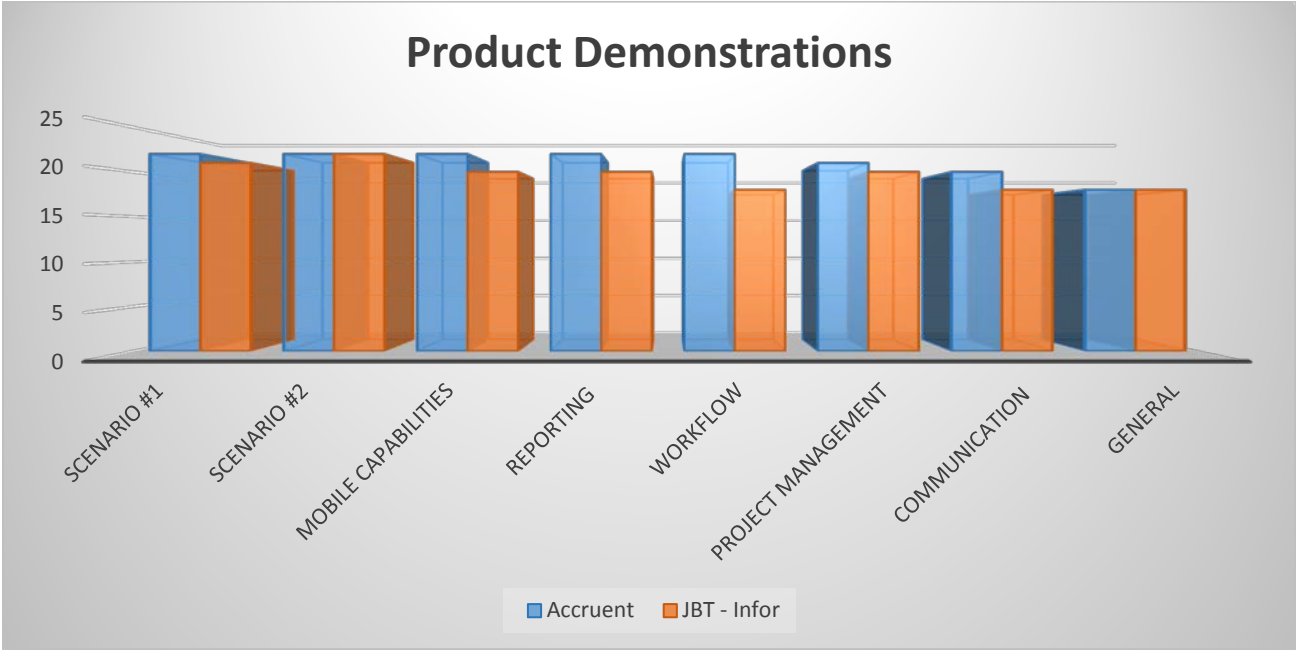
Selection Process

In response to the RFP, four (4) companies submitted proposals; Accruent, AssetWorks, Dude Solutions, and JBT (Infor). Each written proposal was thoroughly evaluated against six (6) weighted selection criteria, as defined in the RFP. Based on the written scoring, two (2) proposals were considered viable solutions, with comparable functional and technical capabilities, as depicted in the following graphics:





In June, 2017, Accruent and JBT (Infor) provided on onsite product demonstration and corporate overview. Each product demonstration was thoroughly evaluated against eight (8) weighted selection criteria. For each criteria the evaluation member were asked to rank each one on a scale of 1-5, one (1) being the lowest and five (5) the highest. At the conclusion of the product demonstration, there was a clear and apparent winner, as depicted in the following graphic:



Selection

The project was placed on a temporary hold until the end of the fiscal year. In July, based upon the results of the competitive procurement, notification and scoring results were sent to the evaluation committee with a request for feedback. To date, a selection recommendation has not been made.

Cost/Fees

Accruent - Cloud Based			
Product	No. of Users	Annual Subscription Fee	Implementation Fee
FAMIS Cloud Maintenance	Unlimited	\$35,000.00	\$36,000.00
FAMIS Cloud Purchase Requisitions Advanced Inventory	Unlimited	\$10,000.00	\$14,000.00
FAMIS Cloud Utilities	Unlimited	\$5,000.00	\$7,000.00
FAMIS Cloud Inspections	Unlimited	\$5,000.00	\$4,000.00
FAMIS Cloud Space	Unlimited	\$25,000.00	\$16,000.00
FAMIS Cloud AutoCAD Interface	Unlimited	\$8,750.00	\$8,000.00
FAMIS Cloud Move Management	Unlimited	\$7,500.00	\$6,400.00
FAMIS Project Center	Unlimited	\$20,000.00	\$24,000.00
FAMIS Cloud MicroStrategy Reporting	Unlimited	\$10,000.00	\$4,000.00
FAMIS Cloud MicroStrategy Web Pro	Unlimited	\$2,500.00	Included
FAMIS Mobile Applications	Unlimited	\$15,000.00	\$12,000.00
FAMIS API Integrations	Unlimited	Included	\$4,000.00
Totals		\$143,750.00	\$135,400.00

Accruent Summary:

- Lots of modules providing substantial flexibility in functionality and pricing.
- Enterprise system allowing for unlimited users making cost allocation to other departments clear and clean.
- No annual true-ups.
- Unclear in proposal what, if any, escalations would be expected.
- Unclear to the realistic cost, if any, for data storage.
- Projected 5 year total contract value \$854,400.00.
- In-house system administration.
- Flexibility in system configuration and labeling for federal/state funding.
- Demonstrated an infrastructure capability.

JBT (Infor) - Cloud Based			
Product	No. of Users	Annual Subscription Fee	Implementation Fee
Infor CloudSuite Facilities Management Professional	50	\$48,750.00	
Infor CloudSuite Facilities OpenCAD	2	\$480.00	
Infor CloudSuite Management Casual User (Read Only)	50	\$4,698.00	
Implementation Over 5 Years			
Year 1			\$113,490.00
Year 2			\$226,980.00
Year 3			\$226,980.00
Year 4			\$226,980.00
Year 5			\$170,235.00
Totals		\$53,928.00	\$964,665.00

JBT (Infor) Summary:

- More traditional system with robust features developed over a long period of time.
- Cost control with per user pricing. As quoted it would be \$575.00 per user.
- Extremely high implementation costs.
- Projected 5 year total contract value as quoted \$1,217,672.55.
- This cost would increase with the addition of users as the system is adopted.
- Time consuming true-up process.
- Vendor controlled system administration.

Options

The scoring as outlined in the RFP is a combined scoring model which really should have been divorced scoring model. If you combine the scores as required by the RFP, JBT (Infor) would be the awarded proposer. If the scores had been divorced, Accruent would be the awarded proposer.

We do have some options:

1. We award to Infor as the highest scoring proposer.
2. We post a post-closing addendum divorcing the scores.
3. We conduct a Best and Final Offer (BAFO) and award strictly based on price.
4. Award to the proposer that the Board of County Commissioners deem to “be best for the public good”.
5. We cancel the RFP and start over.
6. We terminate the project.

Recommendation

Technology is a great tool but comes with a hefty price tag. We need to really focus on what we need and can afford. There is a large gap in the pricing between Accruent and JBT (Infor). At current projections the difference is \$363,272.55 and that gap is likely to increase based on the different pricing structures.

The project team recommendation is to award to the vendor deemed to “be best for the public good”.



GEORGE MARLTON, JD
PROCUREMENT DIVISION DIRECTOR

PROCUREMENT DIVISION
PUBLIC SERVICES BUILDING
2051 KAEN ROAD | OREGON CITY, OR 97045

TO: Laurel Butman, Deputy County Administrator
FROM: Patricia Bride, Procurement & Contract Analyst Senior
RE: RFP #2017-05 – Committee Recommendation for Contract Award
DATE: August 9, 2017

The evaluation committee comprised of Chris Mitchell, Cory Johnson, David Bodway, Matt House, and David Devore have evaluated the proposals received in response to RFP #2017-05 for Building Information and Asset Management Software. The County received proposals from Accruent, Asset Works, Dude Solutions, and JBT (Infor). The combined (written and presentation) scores are as follows:

Proposer	Written Score	Presentation Score	Combined Score
Accruent	4185	169	4345
Asset Works	4038	N/A	4038
Dude Solutions	3658	N/A	3658
JBT (Infor)	4366	157	4523

Based on the above results JBT (Infor) scored the highest amount of points, however, the proposed fees are far outside the project budget. The budget comparison is as follows:

Company	Implementation Fees	5 Year Software Cost	Total
JBT	\$964,665	\$264,024.54	\$1,228,689.54
Accruent	\$135,400	\$718,750.00	\$854,150.00

Based on the above information, the Committee makes the recommendation that Accruent be awarded the contract to complete the project.

Approved: Denied:

Laurel Butman, Deputy County Administrator