

SCOPE OF WORK WORKSHEET

The Scope of Work Worksheet is used by Procurement Services to prepare RFX bid documents (i.e. RFP/RFQ) for the required goods and/or services.

Please provide clear and understandable (non-technical) responses to all sections listed within in the document.

Responses provided will form the project deliverables and basis to evaluate vendor bids for compliance and selection.

Responses need to be definitive, generic and fair to all potential vendors. This will ensure open and fair competition and optimize best value for money (i.e. Lock out specifications is considered an unfair practice).

Generalized and subjective statements should be avoided, as they are typically open to interpretation or impossible to evaluate (i.e. "easy to use", highest quality", etc.).

If a section is not required or not applicable, please indicate N/A in the response section.

PART 1 - HIGH LEVEL OVERVIEW

A) PROJECT SUMMARY: Provide a very high level summary of this project (overview in a few sentences) to quickly understand what needs to be procured. This should be written in simple terms that anyone could understand.

Facilities Management (FM) at Western University is seeking Enterprise Asset Management (EAM) software for the replacement of the current Computerized Maintenance Management System (CMMS) that is approaching end-of-life.

The chosen EAM software will act as the centralized system used to achieve Facilities Management core goals; planning, executing, and optimizing all maintenance tasks for 90+ campus buildings, while maintaining accurate costing, activity lists, resource inventory, and historical data for a wide range of building equipment. The EAM will provide a user friendly and intuitive application for all levels of users. This application will provide FM with accurate institutional data, along with actionable and easily customizable reports for facilities managers.

The chosen solution will also provide natively, or integrate with software providing complex Labour Management tools and reporting for employees across multiple collective bargaining units, with varying vacation accruals and entitlements; ensuring that all maintenance tasks are associated with a corresponding time-card entry.

B) GOALS AND EXPECTATIONS OF THE PROJECT/ VENDOR: Identify major goals/expectations or desired outcomes of the project, including any vendor expectations. Consider what tasks must be achieved to receive a 10-out-of-10 rating. Point form is acceptable.

The primary goal of this project is the successful deployment of a modern and fully supported EAM system. This system will provide all expected EAM functionality such as work order management, preventative maintenance scheduling, asset tracking and costing. FM's expectations:

- Improvement of user experience for both external FM clients (Work Requests, Costing Information) and internal FM staff (Work order management, task information, financial reporting, time card entry)
- Provide functionality for accurate and reliable facility data collection
- Use work orders, PMs, scheduling functionalities, inventory management and have the ability to issue and replenish materials accurately and efficiently (mobile devices for inventory management)
- Create valuable reporting options (customable reports and dashboards) that are actionable
- Robust integrations with PeopleSoft Financials and HR (used centrally by Western) in support of financial and budgetary business processes as well as payroll functionality
- Ability to automate integrations with new Labour Management System or provide LMS support directly
- Thorough training and process documentation for both system administrators and users
- Web-accessible application with full mobile support from a dedicated mobile application
- Reports; to be able to create detailed and customable reports and exportable to various file formats (PDF, Word, Excel)
- Alerting and notifications (required approvals, critical requests, system errors, material handling) using various methods of communication (SMS, E-mail, Push notifications)
- Auditing and trailing logs for actions taken within the system (changes to Work Orders, entities, timecards, etc.)
- Vendor support with regular updates/upgrades is crucial, while establishing a dynamic partnership for future enhancements and product roadmaps
- Flexible feature configurations within the application to meet evolving business needs, without relying on customized code/programming changes.
- Application must be easy to use and intuitive to end-users

C) CURRENT ENVIRONMENT: Describe the current state (overview of current conditions). Identify pain points; strengths; quantities, etc. (include any figures, diagrams). Point form is acceptable.

Facilities Management at Western currently relies on a CMMS that is hosted on-premises, and is soon reaching end-of-life status. This system has a long history of providing adequate support for the work order lifecycle and inventory management, complex support for preventative maintenance scheduling and inventory management, while providing the ability to pull information out of the system to establish reporting and KPIs.

Being an older system, there are concerns surrounding ease-of-use, lack of mobile support, and limited options for external clients to access a work request platform, track requests, or review costing data on submitted requests. Internally, there is significant room for improvement by allowing tradespersons to be assigned tasks via mobile devices, providing them with equipment-specific details, procedural information, as well as safety notices all from a centralized software on their mobile device, driven by a modern EAM.

Strengths:

- Current application has many un-deployed features available
- Application is reliable and stable
- Integration with centralized PeopleSoft environment (Finance & HR)

Pain Points:

- Integration error information and troubleshooting between systems

- Limited integrations lead to manual data entry and manipulation
- Dated application appearance and unintuitive workflow

Quantities:

- Hundreds of thousands of Work Orders (~44,000/year)
- 2300 inventory items turning over three times per year
- Timecard entries *** **
- 100 campus buildings, multiple sites, varied building equipment in both age and design

PART 2 – DETAILED SCOPE OF WORK

A) PROCUREMENT TIMING/PROJECT SCHEDULE:

Are there any specific dates that Procurement Services needs to be aware of in preparing this RFx?

Things to consider are:

- Date the project needs to be awarded by
- Deadline for vendor project completion
- Any special time requirements that the vendor needs to meet

B) DETAILS, REQUIREMENTS, and SPECIFICATIONS:

Provide all of the details, requirements or specifications that must be met to achieve high satisfaction.

Things to consider are:

- Minimum requirements that must be satisfied to meet the goals/expectations outlined in Part 1
- Detailed, generic specifications of any goods
- Minimum standards that must be met
- Inclusion of any plans or drawings

- Intuitive interface, user experience
- Reporting
- Integrations
- Flexible feature configurations within the application to meet evolving business needs, without relying on customized code/programming changes.
- ****Assistance needed from Procurement (assuming basic EAM functionality exists? Spelling out basic functionality? How detailed)**

C) SPECIAL/UNIQUE REQUIREMENTS:

Does this project have any special or unique requirements that should be disclosed to vendors? Things to consider are:

- Requirements or conditions of the project that vendors may not have encountered in the past for similar/other projects
- Constraints that you have, or the vendor may have, or the project may run into
- Exclusions from this project that the vendor must be aware of
- Future conditions (outside of this scope of supply) that the vendor should be aware of

- Multiple labour units with differing skill sets required for completion of tasks
 - Uncertainty around the need/ability to have an included or discrete Labour Management System to handle complex payroll functions
- Maintaining two different rates (Earn Rate and Charge Out Rate) for completed work
- Implementation timelines (cannot implement during critical times (Start of Term, Fiscal Year End)

- Integration with systems already existing and in enterprise-level use on campus, namely PeopleSoft Financials (Labour Transactions, Inventory issuance/adjustments, cycle counts, Purchase Orders, vendors, and Speedcodes) and PeopleSoft HR (payroll information), with further integrations needing to be created.

D) INSTALLATION/ IMPLEMENTATION REQUIREMENTS:

Is installation/implementation required by successful vendor?

If so, specify any installation or implementation expectations.

Notice of Project: Required for projects with infrastructure changes over \$50,000, i.e. electrical upgrades, installation of waterlines, soundproofing, building equipment on site, etc. Will a notice of project be required?

<https://www.enop.labour.gov.on.ca/ENOPWeb/GeneralInformation>

- Installation and significant initial support required by vendor
- Implementation consultant and trainer (w/ documentation)
- Device agnostic for mobile applications
- Creation of a production and test environment, including integrations to PeopleSoft test environments
- Hardware consultation process if not a SaaS solution (WTS, Vendor, FMTS input required)
- Technology Risk Assessment must be completed to comply with Western security requirements
- Internal audit of planned processes