

EXECUTIVE SUMMARY

Recommendation of \$500,000 or Less FY20-199 – Computerized Maintenance Management System

Introduction

Responsible: Procurement & Warehousing Services (PWS)

This request is to approve the Agreement between International Business Machines Corporation (IBM) and The School Board of Broward County, Florida (SBBC), for one (1) year commencing February 23, 2020 through February 22, 2021, with a \$420,000 spending authority for FY20-199 – Computerized Maintenance Management System.

Item EE-3 being presented at this School Board meeting is requesting the reduction of \$450,000 on the approved spending authority for Electronic Data, Inc. (EDI) related to Maximo licensing renewal that was previously included in FY20-073 – Continuation of the Lease or Maintenance of District Software & Hardware, approved by the School Board as item EE-10 on May 7, 2019.

Goods/Services Description

Responsible: Information Technology (IT)

Maximo is an enterprise asset management system published by IBM. In 2016, SBBC entered into an agreement with EDI, Inc. for i) the licensing of the platform and ii) configuration services for Maximo, to be used to support the Physical Plant Operations' work order ticketing and tracking process. This contract contemplated the implementation of the high-level features documented in Exhibit 1.

As the original contract term of Maximo approached conclusion, the District identified an opportunity to centralize the asset management and service request processes within key divisions, so that its stakeholders have one (1) streamlined point of contact and support for operational needs, as documented in Exhibit 2. This effort goes forward as a critical component of the "Refresh, Redesign, and Reduce Risk" and "Our Data, Our Tools" Campaigns of the Strategic Plan, which focus on the streamlining of business processes and data governance, respectively. Exhibit 3 documents the District's strategic focus to improve the stakeholder experience for operational management and support. Finally, Exhibit 4 documents the purpose of the Centralized Operational Support Executive Steering Committee (COSESC) and HelpDesk charge.

Procurement Method

Responsible: PWS & IT

Procurement & Warehousing Services (PWS) and Information Technology (IT) collaborated to source Maximo software directly from IBM as part of a larger initiative to improve this widely used system. IBM will provide additional services and support, including upgrading of the Maximo environment and the inclusion of a mobile application. The agreement was negotiated pursuant to Purchasing Policy 3320, Section II, H, and pursuant to the Department of Education, Rule 6A-1.012, 1 l(b), Florida Administrative Code as authorized by Section I010.04(4)(a), Florida Statutes, the requirement for requesting competitive solicitation for commodities or contractual services from three (3) or more sources is hereby waived as for the SBBC's purchase of computer software.

Financial Impact

Responsible: PWS & IT

The IT operating budget will fund the spending authority of \$420,000.

The approval of this recommendation does not mean the authorized amount will be spent.

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Exhibit 1: Departments in Initiative

Information Technology (IT), Finance (Fin), Human Resources (HR), Buildings Dept (BD), Procurement & Warehousing Services (PWS), PPO/Facilities (PPO), Safety, Security and Risk Management (SSRM), Food & Nutrition Services (FNS)

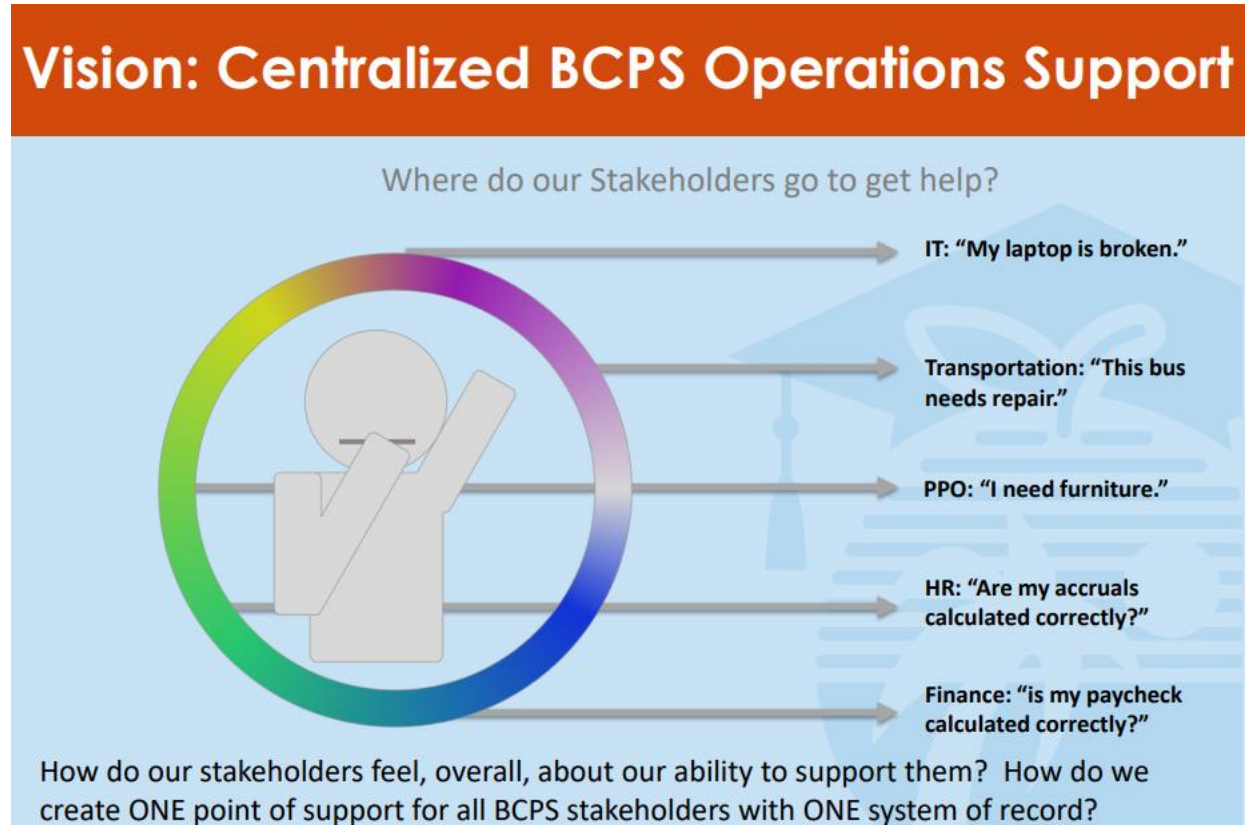
FEATURES	Departments Needing Functions	Status as of 1/20/2020
Operating Location Management	IT, PPO, SS, Transportation	Maximo configured functionality and in use by PPO.
Equipment Tracking	IT, PPO, SS, Transportation, Audit	Maximo configured functionality and in use by PPO.
Tracking Labor Resources	IT, Fin, PPO, SS, Transportation	Maximo configured functionality and in use by PPO.
Safety Plan Management*	PPO, SS	Not within the scope of Maximo today. Other systems being defined/implemented by SS.
Inventory Control	IT, PPO, Transportation	Maximo configured functionality and in use by PPO.
Work Order Tracking	PPO, BD?, Transportation, IT, SS	IT uses Remedy
Work Management Planning	PPO	Maximo configured functionality and in use by PPO.
Preventive Maintenance (PM) Planning	PPO, Transportation	Maximo configured functionality and in use by PPO.
Facility/Equipment History	PPO, Transportation	Maximo configured functionality and in use by PPO.
Purchasing*	PWS	Part requests are initiated and received within Maximo (only for those using Maximo) but are transmitted to SAP. Not within the scope of Maximo today. Other systems being defined/implemented by PWS (Ariba/DemandStar)
Integration with SAP	PPO	Maximo configured functionality and in use by PPO Inventory not completely implemented.
Maximo Work Center/End User Portal**	PPO	Allows end user to create work orders through a web portal; will be implemented in 2020 – done through SuiteReq today. IBM would replace SuiteReq with WorkCenter.
Maximo Email Listener***	PPO, District	Allows end user to create work orders through email; will be implemented in 2020. NO PROCESS for this today. Huge opportunity but huge ask as well.

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Exhibit 2: Support Use Cases and Current Systems of Record for Service

FEATURES	USE CASES	Current Systems of Record for Service
IT	Classroom Tech Support, Device Break/Fix (Metrology), IT Service Desk, TERMS support, IT Security, MPS	Kinetic/Remedy/Lexmark
Finance	Vendor Relations (Invoice – A/P), Payroll & Benefits Issues	Email & Spreadsheets
HR	HR Complaints, Accrual Issues, employee evaluations	Filemaker
BD	Permits/Inspections	ISS
PPO Facilities	Facilities/Janitorial/Electrical/...	Maximo
SSRM	Fire Alarms & Code Red Drills,	In process
PWS	Vendor – PO Issue, add vendor	SAP Ariba/DemandStar
FNS	POS, Inventory	Edison
Transportation	Maintenance / Dispatch Parent call	Maximo
Business Support Center	Office Managers on bookkeeping issues	SAP
OSPA	OSPA Central for critical incidents, teacher out, PIVOT memos	Sub Reporting App
Student Support Initiatives	Bullying hotline, suicide prevention, mental health hotline	Various

Exhibit 3: Overview of Strategic Plan



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Exhibit 4: Centralization of HelpDesk Charge

Charge to the Group:

The purpose of the COSESC is to provide intellectual insight and executive accountability to one (1) implement a single point of contact for all SBBC stakeholders for operational support; two (2) benchmark current resolution times within each applicable scope area; and three (3) a plan for optimization of customer resolution times within the next two (2) fiscal years. Future resource requests for support should be brought before this committee.

Committee Membership and Participation:

This committee consists of approximately eighteen (18) SBBC district staff members who have expertise and accountability for implementing operational processes and support services in various areas. Membership shall be comprised of:

- Chief of Staff
- Chief Information Officer (CIO)
- Chief Strategy and Operations Officer (CSSO)
- Chief Financial Officer (CFO)
- Chief Human Resources Officer (CHRO)
- Chief Safety, Security, and Risk Management Officer (CSSRMO)
- At least one (1) Director-level representative from each Chief

Timeline:

- This committee will meet once monthly on Friday from 9:30-11 am (except for February 7, which will be from 1-2:30 pm) with the first meeting on October 11 (see dates by meeting agenda below).
- Workgroups will be developed from the larger membership to address specific issues at agreed-upon times and dates if members are interested and available.

Tasks: A draft list of tasks by month is shown below. Meetings may also include feedback from schools and administrative units on the COS implementation in addition to the sharing of best practices.

Meeting 1: January 2020 – What is the Scope of This Initiative?

- Review COSESC agenda for the year.
- Review provided materials on industry-standard service benchmarks in each of the applicable service areas.
- *Potential workgroup tasks:*
 - Document scope of COS initiative – What specific functions and processes will be rolled into a single point of contact? What are the use cases?
 - Document personas served by each business function within scope.
 - Document current systems of record, roles, and responsibilities currently linked to each function in scope.

Meeting 2: February 2020 – What Does Success Look Like?

- What does an evaluation plan look like to measure the success of this effort?
- What does a change management plan need to address to ensure optimal stakeholder satisfaction?
- What type of data does the District need to collect over the next month to benchmark SBBC's current service levels?

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- *Potential workgroup tasks:*
 - Document gap analysis comparing the end-state business process against currently available tools.
 - Document “soft targets” serving as the hypothesized service metrics that can be improved within a ninety (90) day period.

Meeting 3: March 2020 – Curriculum Information Management System (CIMS) Integration Into Day to Day Work.

- Review current best practices in digital learning across GPS and recommend/initiate processes to input these into the new CIMS.
 - How does the District identify best practices in the schools?
 - How do the District capture and share best practices in CIMS?
 - How does the District implement best practices with fidelity?
 - How does the District assess best practices?
 - What data does the District need to incorporate into daily practices to ensure SBBC is on track with the District’s goals?
- Promote technology tool use in schools to ensure learning is authentic, relevant, and meaningful to students.
- *Potential workgroup tasks:*
 - Examine and recommend alternative professional learning options beyond face-to-face, including professional learning communities (PLCs) in virtual collaboration spaces.

Meeting 4: April 2020 – How Is SBBC Doing? Mid-Year Check Point

- Review mid-year program evaluation reports and make recommendations to improve the program evaluation process.
- Demonstrate examples of personalizing student learning using digital tools.