Memorandum

DATE: **August 14, 2025**

FROM: **Erica Paslay, Capital Projects Manager**

TO: **Prospective Computerized Maintenance Management System Vendors**

SUBJECT: **Computerized Maintenance Management System Request for Proposal (RFP)**

Summary

The Novato Sanitary District is evaluating new software to satisfy its Computerized Maintenance Management System (CMMS) application needs.

The District appreciates a proposal response to include all costs associated with training, implementation, hardware specifications/hosting costs (if applicable), interface estimates, data conversion assistance, annual maintenance, and support.

- **Questions** related to this information request are to be directed**, by email** to Erica Paslay, Capital Projects Manager at ericap@novatosan.com no later than **Thursday, September 4, 2025**. Only written questions submitted by email by the stated date will be accepted.

  - All questions and responses will be compiled and submitted electronically in one general response memorandum on **Wednesday, September 17, 2025**.

- Vendor **responses are requested by 3:00 p.m. PT on Tuesday, September 30, 2025**. No late responses will be accepted. Submit electronic responses to Erica Paslay, Capital Projects Manager by email to ericap@novatosan.com.

Thank you for your participation. We look forward to reviewing your response.

Erica Paslay
Capital Projects Manager
Novato Sanitary District
500 Davidson Street
Novato, CA 94945

1. Purpose

This information was developed to facilitate the preparation of a proposal in response to this RFP and the subsequent evaluation of that response.

The Novato Sanitary District currently utilizes the following core systems:

CMMS

- POSM - CCTV inspection software
- RedZone ICOM - work order system for gravity sewers
- JOB Cal Plus – work order system for lift stations, vehicles, fire extinguishers, and outfall assessments
- SCADA - alarm logs and monitoring
- WIMS - lab software
- Microsoft Excel - repair requests
- Sewer Service Call system (PDF Form)
- Boss 811 – utility locations

Integrations

- ESRI ArcGIS Pro
- Laserfiche - electronic content management
- Third-party report writing services
- Email integration
- Single Sign-On/Active Directory

2. System Functionality Requirements

The District is looking for an integrated system, which is to include the following primary functionality (modules). This list is not intended to be all-inclusive/exclusive.

- Work Orders
    - Preventative/Predictive Maintenance
    - Asset Tracking
    - Inspections/Condition Assessment
- Mobile Field Application
- Warehouse Inventory Management
- Facilities Maintenance
- Request Management
- Report Writing

The District seeks to install the system utilizing the vendor to provide all services, including software, installation, process discovery, training, project management, interfaces, conversion assistance, maintenance, and support. Applicable hardware specifications with sizing documentation should also be provided.

3. Background

The District is looking for the best overall solution to meet its current and future needs. It is understood that there are no perfect solutions, and that the applicable vendor may vary in its capability to meet the District's overall system needs.

As a special district, Novato Sanitary District is an independent local agency with a publicly elected board of five directors, currently serving approximately 60,000 residents. The District's primary responsibilities include wastewater collection and treatment, water recycling, and solid waste collection and disposal. Novato Sanitary District provides responsible, environmental, and economical wastewater and solid waste resource management for Novato.

Some Novato Sanitary District statistics are identified in the table that follows:

Operating Budget	$13,972,507
Capital Budget	$15,932,700
Number of Employees (FTE)	22
Number of Permanent Part-Time Employees	2
Number of Customers	23,000

The Novato Sanitary District's Organizational chart is presented below.

4. Organizational Chart
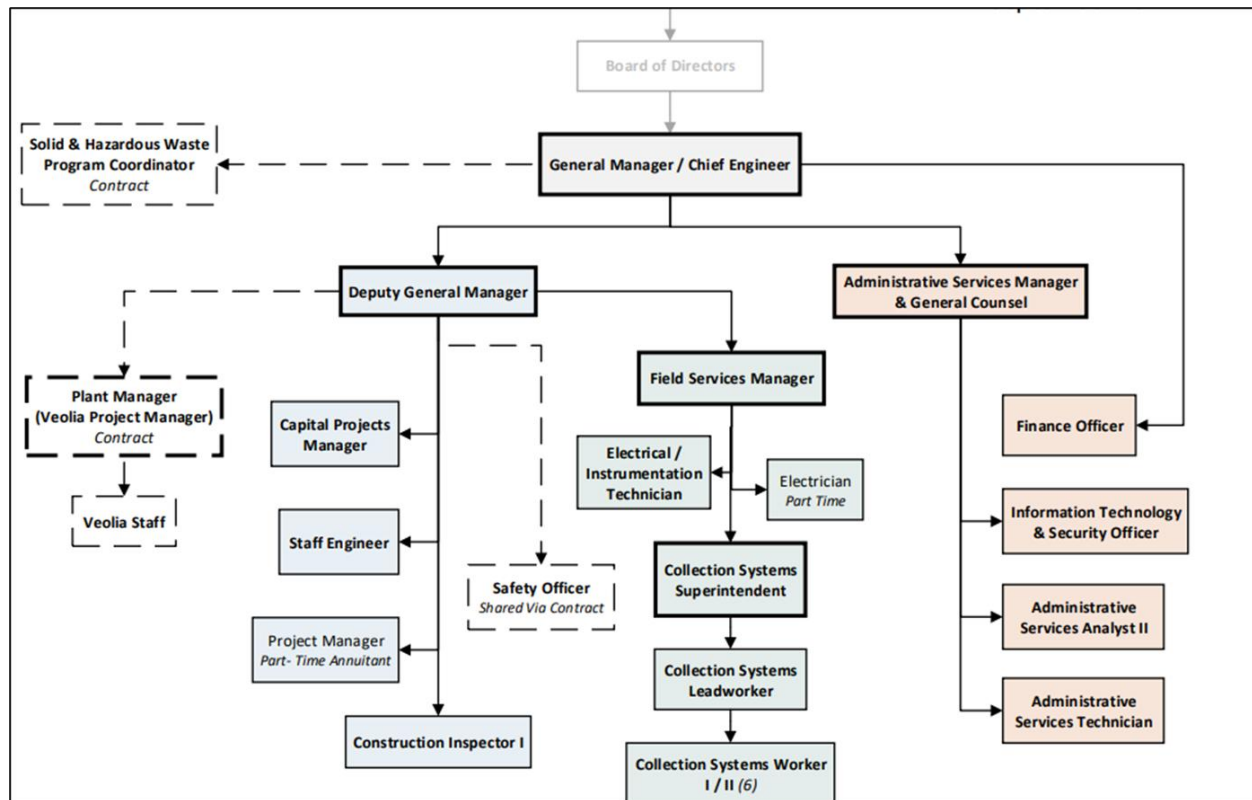
5. Process and Schedule

The process is for the District to review the responses, evaluate and demonstrate the proposed solutions, check references, conduct site visits, and finalize a project scope of work.

Selection Process	Target Dates
Release and Issuance of the Request for Proposal (RFP)	8/14/25
Vendor Questions Due	9/4/25
Date for the District to Provide Answers to Vendor Questions	9/17/25
Vendor Proposal Responses Due	9/30/25
Decision on Vendor Finalists (Short-List)	October 2025
Demonstrations by Vendor Finalists	November 2025
Reference Checks	November – December 2025
Final Vendor Selection	January 2026
Contract Negotiations	February 2026
Implementation Start	May 2026

6. Evaluation Criteria

The District reserves the right to select the vendor who best meets the overall needs, which is based primarily on the following criteria (not listed in any order of importance):

- The overall capability to provide the required software features and capabilities, including, but not limited to the system's ability to integrate with ESRI ArcGIS Pro or ArcGIS Online
- The amount of vendor support that will be available for implementation, conversion, training, ongoing modifications, and software support
- The total costs of the system implementation and ongoing support
- The vendor's performance record-to-date in meeting the requirements of its existing customers, as well as the availability of users similar to the District to allow reference investigation
- The financial stability, longevity, and strength of the vendor
- Ease and intuitive use of software

7. Specific Response Information

The following is a list of the District's specific concerns and information request items. Please respond to each issue in detail in a section of your proposal .

A. Implementation Methodology

Please describe your implementation methodology with milestones and timeframes. Include a preliminary implementation schedule for all applications/functionality, including the required time for onboarding, planning, configuration system and application training and program testing. Please include how you expect to sequence the installation of the various applications or application groupings.

B. Training and Education

Please provide consulting and training options, including classroom (on-site and off-site), online (group and self-paced), training videos, and manuals. Include training for all required staff and users. Include ongoing training and user support group training.

C. Project Management

The District will provide a designated project manager and expects the vendor to do the same. Please include recommended vendor project management costs (**Appendix G**) in the response and **describe, in detail, services to be provided**.

D. Customer Implementation Responsibilities

Please describe and/or provide a list of the typical customer implementation responsibilities, as well as an estimate of the amount of effort each customer implementation role can be expected to dedicate to the project.

E. Workflow Capabilities

Please provide information on your system's workflow capabilities. Describe the integration level with all systems. If you have no workflow capabilities, please indicate.

F. Mobile Field Computing

Please describe your solution's mobile field computing options, including full application access through wireless VPN connectivity (i.e., no vendor software required), mobile field application for use with laptops or mobile field applications with use of tablets (e.g., iPads, Surface, etc.).

G. Reporting Capabilities

Please provide information on overall system/solution reporting capabilities (e.g., canned reports, ad hoc reporting, executive dashboard, etc.).

H. Software System Architecture

Please describe the programming languages, operating systems, user interface, and database management system used for your application.

I. Software Upgrades

Please describe your software versioning and update policies/practices. Include, at a minimum, how often you issue new versions and whether new versions are provided as part of your annual maintenance and support fees. Please explain the process of installing update patches and service packs.

J. Maintenance and Support

Please describe all support services available from your company in **Appendix C**. Specifically address the following issues:

- Normal hours of availability
- Online support information
- Online chat capabilities
- Remote system access capabilities
- Access via a toll-free 800 number
- Costs
- Quality assurance program(s)
- Other support services
- Service-Level Agreements (SLA) – Response time (by priority or severity levels), escalation processes, and other metrics

K. Cost Considerations

Initial one-time costs for hardware (if applicable), implementation, training, software licensing, travel, and related costs, etc., must be included with the price proposal. See electronic price proposal form (**Appendix G**).

Recurring annual costs should be described in the proposal, clearly stating what is included (e.g., application upgrades, state and/or federal reporting requirements, hours of support, etc.) (**Appendix G**). The District prefers unlimited telephone support. If after-hours support is only available at an hourly rate, this should clearly be indicated.

The objective is to have **no hidden or unexpected costs**.

L. Vendor/Reseller Information

Please provide information related to your company as requested in **Appendix B**. In addition, specifically address the following issues:

- If you are a software reseller/partner, please provide the same company and reference information for your specific company in addition to the software vendor's information in **Appendices B and C**.
- If your proposed solution belongs to a parent/consolidation company, only provide references for the proposed solution in **Appendix C**.

M. References and User Base

Please provide references for five (5) completed projects of similar scope and nature to the District, **preferably within the same region**. A reference worksheet is provided in **Appendix E**.

Additionally, please provide an organization-name list of all active customers within the state of California. Contact information is not necessary.

8. Integration/Interface Capabilities

The District is expecting to expand its integration and interfaces with key systems. Please include an estimated range of costs for the integrations below, if available. Costs for proposed integrations are to be included in **Appendix H** (MS Excel). A screenshot is provided below.

Appendix H INTERFACE COSTS					
Interfaces/Integrations Name	**Description**	**Interface Direction(s) (One-way or Two-way)**	**Third-Party Software (Vendor Name, Product Name, & Version)**	**Frequency / Real-Time Active (As Needed, Scheduled or Real-time)**	**Integration Type (Import or Export)**
Please provide both low and high estimated cost					
Asset Management					
Asset Import	Import assets into the system, including associations to existing asset layers (e.g., import sanitary sewer pipe inventory and linking to the appropriate street segment) using GIS, Excel, or CSV file format.	One-way	SQL from ICOM, JobCal+, POSM, GIS	As Needed	Import
Time and Attendance	Ability for work order time entered in the system to update the District's time and attendance solution.	One-way	TBD	Scheduled	Export
CCTV Inspection Software - Push Scheduled Inspections/Work Orders	Push scheduled line maintenance inspections/work orders from the system.	One-way	POSM	Scheduled	Import
CCTV Inspection Info Import	Import CCTV inspection related information (e.g., date of inspection, asset condition, status, etc.)	One-way	POSM	Scheduled	Import
Others					
Email Integration	Ability to send emails from system utilizing standard SMTP protocols.	One-way	MS 365	As Needed	Export
Single Sign-On / Active Directory	Support of Single-Sign-On and Active Directory.	Two-way	MS 365	As Needed	Import/Export
Multi-Factor Authentication (MFA)	Support Multi-Factor Authentication (MFA).	Two-way	MS 365	As Needed	Import/Export
Ad Hoc Third-Pary Report Writers	Ability to integrate with third party report writers.	One-way	N/A	As Needed	Export
Electronic Content Management System	System must integrate with the agency's Electronic Content Management System (e.g., ability to track private lateral inspections tied to a permitted or inspection stored in Laserfiche).	One-way	Laserfiche	As Needed	Import
Barcode Scanners for Inventory	Ability to integrate with barcode scanners for retrieving asset records and for issuing inventory parts to work orders.	One-way	TBD	As Needed	Import
GIS & GIS Mapping (ESRI ArcGIS Pro)	Ability to interface with GIS mapping products that support Esri formats.	Two-way	ESRI ArcGIS Pro	Real-Time	Import/Export
Rest API	Provide a REST API interface to facilitate querying data and integration.	Two-way	N/A	As Needed	Import/Export

9. User License Information

Description[1]	Quantity
Concurrent Users	15
Total User	20
Mobile User ID Licenses	7

[1]See the table under the "User Access Requirements by Module" of Section 3 *Specific Response Requirements* for user access requirements by individual module.

10.   Volumes and Conversions

The tables below summarize the estimated volumes of transactions and records associated with the application processing requirements and preliminary conversion requirements.

Volumes Information

Volume Description	Quantity / Estimate Transactions
Work Order & Maintenance Management	
No. of sewer hookups	21,000
Infrastructure assets (total number)	6,357 structures (MH, RI, Stub, PS, etc.)
No. of line segments	6,403
No. of plants (operated by District staff)	1
No. of lift/pump stations	42

Conversion Information

The District anticipates electronic data conversions, depending on cost. Please include an estimated range of costs for data conversions for each application, if available, and a description of data that would be typically converted. Costs for proposed data conversion are to be included in **Appendix I** (MS Excel). A screenshot is provided below:

				Existing Software Product		
Appendix I **CONVERSION COSTS**						
Conversions	**Description**	**Number of Records (Estimated)**	**No. of Years Of Data**	**Software Application**	**Version**	**Database**
See the Conversion Information Table in the RFP Document for further detail						
Please provide both low and high estimated costs						
Asset Management						
Master Asset Records		15,000	10	ESRI ArcGIS	Pro	ESRI
Work Orders – Historical Work Orders	Current work order system for gravity sewers and mapping capabilities.	42,000	10	RedZone Robotics	ICOM3	SQL
Work Orders – Open	Current work order system for gravity sewers and mapping capabilities.	350	10	RedZone Robotics	ICOM3	SQL
Work Orders – Historical Work Orders	Current work order system for lift stations, vehicles, fire extinguishers, and outfall assessments.	21000	10	Hach	JOB Cal Plus	Microsoft Access
Work Orders – Open	Current work order system for lift stations, vehicles, fire extinguishers, and outfall assessments.	175	10	Hach	JOB Cal Plus	Microsoft Access

11.   Response Forms and Supporting Information

This section of the RFP explains the required response forms and other supporting information designed to assist the vendors in their response.

Appendices need to be filled in and submitted using these electronic forms (Excel).

Appendix A   *Computerized Maintenance Management System Feature/Function Worksheet Tabs*

Appendix B   *Vendor Profile*

Appendix C   *Vendor Software Support*

Appendix D   *Vendor Customer Base*

Appendix E   *Vendor References*

Appendix F *Vendor General System Information*

Appendix G *Cloud-Hosted Project Costs*

Appendix H *Interface Costs*

Appendix I *Conversion Costs*

Appendix J *Modification Costs*

Please also include in your response detailed information regarding:

A. Implementation Methodology
B. Training and Education
C. Project Management
D. Customer Implementation Responsibilities
E. Workflow Capabilities
F. Mobile Field Computing
G. Reporting Capabilities
H. Software System Architecture
I. Software Upgrades
J. Maintenance and Support
K. Cost Considerations
L. Vendor/Reseller Information
M. References and User Base