



#### RECOMMENDED ACTION

To authorize the President and CEO to enter into a contract with Intueor Consulting, Inc. for the provision of an Enterprise Resource Planning (ERP) and Enterprise Asset Management (EAM) technical consulting services.

#### STAFF REPRESENTATIVE

Lisa Patton, Executive Director/VP, Finance and Budget

#### BACKGROUND

ERP is a software system that manages a wide variety of day-to-day operational tasks than include accounting, human resources and materials management. EAM focuses on controlling the assets in an organization that include maintenance, monitoring, management and forecasting in order to optimize an organization's assets.

LBT's current ERP/EAM software, ASEA Brown Boveri Ltd. (ABB) Ellipse version 6.3.3, is a hosted, on-premise legacy software solution with technical administration contracted out to a third party. Ellipse version 6.3.3 serves approximately 200 active users within the agency, however it is no longer supported by ABB. As technology advances, including new business essential software, third-party software integrations with the current ERP/EAM system are difficult, limited or unavailable.

Although Ellipse version 6.3.3 has been providing the basic functionality that staff requires to administratively operate LBT, there are a number of gaps in the current solution and numerous workarounds that have been developed in order for LBT to accomplish its business functions. LBT has been required to adopt heavily customized and complex Ellipse modules that have already exceeded useful life.

Ellipse version 6.3.3 has exceeded its useful life and in order to continue LBT's basic administrative functionality, a new ERP/EAM is required.

The ERP/EAM technical consultant would accomplish the following goals:

- Provide a qualified ERP/EAM subject matter expert (SME) who will act as the primary technical representative to the project with experience in implementation of ERP/EAM systems for public transportation agencies
- Develop and document detailed existing (as is) and proposed (to be) functional and data requirements, including business process workflows for all LBT's departments for new ERP/EAM software
- Prepare and assess potential alternatives for Ellipse ERP/EAM software
- Prepare a scope of work and collaborate with LBT project team on RFP assimilation



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- Guide LBT through the ERP/EAM software selection process and provide support that includes but is not limited to pre-bid support, evaluation team orientation support, proposal evaluation support, attending software demonstration including demo coordination
- Participate in scope of work, cost and contract negotiations as needed with one or more selected vendor(s) to ensure a performance-based contract
- Provide subject matter and implementation support to assist LBT with the implementation and transition to the new ERP/ EAM systems

### PROCUREMENT

LBT issued a Request for Proposal (RFP) to multiple firms nationwide and received four qualified proposals.

The proposal was evaluated based on the following criteria:

- Qualifications of the Firm
- Staffing and Project Organization
- Technical Solutions/Work Plan
- Price

The total amount of possible points for the technical evaluation was 80. Pricing made up an additional 20 points, for a total of 100 points.

The combined technical score and overall cost resulted in the selection of Intueor Consulting, Inc., which received the highest score of 83.50 points.

Intueor Consulting, Inc., headquartered in Irvine, California, was found to be responsive and compliant by LBT's Purchasing department.



#### **DBE/SBE PARTICIPATION**

A Disadvantaged Business Enterprise (DBE) goal of 16% was established for the solicitation. Intueor Consulting, Inc., a DBE-certified firm through the California Unified Certification Program, has satisfied the DBE goal and will perform 57% of the total contract costs.

#### **ALTERNATIVES CONSIDERED**

Staff did not consider alternative options, as this would leave LBT with an unsupported ERP/EAM system that will compromise LBT's ability to operate efficiently.

#### **BUDGETARY/FISCAL IMPACT**

Funds for this project have been included in the previously approved Fiscal Year 2021 and Fiscal Year 2022 capital budgets. Federal funds will be utilized for this procurement.

#### **STAFF RECOMMENDATION**

Staff is requesting LBT's Board of Directors to authorize the President and CEO to enter into a contract with Intueor Consulting, Inc., for the provision of ERP/EAM technical consulting services at a cost \$1,030,420 with a 10% contingency in the amount of \$103,042 for a total amount not to exceed \$1,133,462.

A handwritten signature in blue ink, reading 'K. McDonald'.

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Kenneth A. McDonald  
President and Chief Executive Officer