



## Maintenance Management, Facility Planning Software and Implementation

### AGENDA 7/25/12

- A. Introduction
  - 1. SOCCCD
  - 2. FPPS
  - 3. Foundation for California Community College/Onuma, Inc.
  - 4. Alpha Facilities Solutions
  - 5. SchoolDude
  
- B. Roles and Responsibilities
  
- C. Work Plan
  - 1. Project Initiation and Planning
    - Interview Facilities Maintenance and Project Management Staff
    - Contact and communication for gathering data, scheduling assessments getting access or keys.
  - 2. Pilot Assessment
    - Perform a pilot assessment and report on a selected sample group of buildings.
    - Review and report with Team.
  - 3. Primary Assessment and Data Entry
    - Test Data with SchoolDude & Onuma System
  - 4. Facility Condition Index (FCI)
    - Development of FCI to quantify the deficiencies in each building
  - 5. Capital Planning, Goals and Investment Strategies
    - Development of forecast for the renewal of building systems through life-cycle analysis
  - 6. Equipment Inventory
    - Provide an inventory of fixed visibly accessible building equipment
  - 7. Planned Maintenance Installation in SchoolDude
    - Import Data and Testing
  - 8. HVAC System Assessment
    - Condition assessment to be conducted on the HVAC Systems
  - 9. Prepare for use in FUSION+CCC GIS+Onuma System
    - Import data and Testing
  - 10. Integration of Other Facility Data
    - Identify other facility data for integration
  - 11. Training
  
- D. Timeline
  
- E. Next Step
  
- F. Questions

Facility Condition Assessment Services Project  
Planning and Implementation

**Program Responsibility Matrix**

The purpose of this is to identify the primary members of the project team and to summarize their tasks and responsibilities.

The primary members of the project team are:

1. South Orange County Community College District
2. Facilities Planning & Program Services, Inc.
3. SchoolDude
4. ALPHA Facilities Solutions
5. Onuma Inc.

The following codes are used to indicate responsibilities:

- P – Primary Responsibility
- S – Supporting Role
- I – Information only

| Activity  | SOC CCD | FPPS | SD | ALPHA | Onuma |
|---|---------|------|----|-------|-------|
| <b>Project Initiation and Planning</b>  |         |      |    |       |       |
| 1. Define Technical Specs for PD Enhancements                                 | S       | I    | P  | I     | S     |
| 2. Develop Test Data for PD Export to Onuma Fusion                            | I       | I    | S  | P     | S     |
| 3. Export PD test data to FUSION and confirm data transferred properly        | I       | I    | P  | I     | S     |
| 4. Inventory Existing Data and Drawings                                       | P       | S    | I  | S     | S     |
| 5. Gather drawings for Assessment and Equipment Inventory                     | P       | S    | I  | S     | S     |
| 6. Review Drawings and Organize for Project Use                               | I       | I    | I  | P     | I     |
| 7. Develop Proposed Project Schedule  | S       | S    | I  | P     | S     |
| 8. Develop Project Standards  | S       | S    | I  | P     | I     |
| 9. Train Assessment Team on Project Standards                                 | I       | I    | I  | P     | I     |
| <b>Facility Condition Assessment, HVAC Assessment and Equipment Inventory</b> |         |      |    |       |       |
| 1. Assessment Project Kick-Off Meeting  | S       | S    | I  | P     | S     |
| 2. Interview Maintenance and Project Management Staff                         | S       | S    | I  | P     | I     |
| 3. Perform Pilot Assessment   | S       | S    | I  | P     | I     |
| 4. Pilot Assessment Data Analysis and QC                                      | S       | S    | I  | P     | S     |
| 5. Prepare Pilot Data Summaries for Client Review                             | I       | I    | S  | P     | I     |
| 6. Review and Approve Pilot Data Summaries                                    | P       | S    | I  | S     | S     |
| 7. Export Pilot PD data to FUSION and confirm data transferred properly       | I       | S    | P  | I     | P     |
| 8. Provide Assessment Team Escorts, Keys, Ladders etc.                        | P       | S    | I  | S     | I     |
| 9. Perform Primary Assessment and Data Entry                                  | I       | I    | I  | P     | I     |
| 10. Perform Equipment Inventory   | I       | I    | I  | P     | I     |
| <b>Project Deliverables</b>   |         |      |    |       |       |
| 1. Populate PD Database   | S       | S    | S  | P     | I     |
| 2. Develop Draft Report   | S       | S    | I  | P     | I     |
| 3. Review Draft Report  | P       | S    | I  | I     | I     |
| 4. Publish Final Report   | S       | S    | I  | P     | I     |
| 5. Export PD Final Data to FUSION and confirm data transferred properly       | S       | S    | P  | S     | P     |
| 6. SchoolDude PlanningDirect Training and Technical Support                   | S       | S    | P  | I     | I     |



**COMPUTERIZED MAINTENANCE MANGEMENT SYSTEM PLANNING & IMPLEMENTATION**  
**Program Responsibility Matrix**

The Responsibility Matrix identifies primary members of the Project Delivery Team and summarizes their tasks and responsibilities in the planning and the design of each project. The Primary members of the Project Delivery Team are:

**SOCCCD** South Orange County Community College District Maintenance and Facility Management staff  
**Dude** SchoolDude.com Client Services team members

The following codes are used to indicate level of responsibility:

1. **Primary Responsibility**
2. **Supporting Role**
3. **Information Only**

| Week | SchoolDude Application Roll-out   | SOCCCD | Dude |
|------|---|--------|------|
| TBD  | <b>PD Administrator training</b> (Upon completion of Alpha's requirements)                        | 1      | 1    |
| 1    | <b>MD Administrator Training &amp; Setup</b>  | 1      | 1    |
| 1    | • Import Locations & Location Codes   | 1      | 1    |
| 1    | • Import Building & Building Codes  | 1      | 1    |
| 1    | • Setup Crafts (Trades)   | 1      | 2    |
| 1    | • Setup Purposes  | 1      | 2    |
| TBD  | • Import Equipment (From Alpha Assessment)  | 1      | 1    |
| 1    | • Setup other desired fields for use (Budgets, Projects)  | 1      | 2    |
| 1    | • Setup Primary Users (Supers, Techs, Site Admins, etc.)  | 1      | 2    |
| 2    | • Conduct Role-Based trainings: Supervisors & Technicians   | 1      | 1    |
| 2    | • Setup Requester page ( <a href="http://www.myschoolbuilding.com">www.myschoolbuilding.com</a> ) | 1      | 2    |
| 3    | • Roll-out MySchoolBuilding to Organization   | 1      | 2    |
| 3    | <b>PMD Training &amp; Setup</b>   | 1      | 1    |
| 3    | • Setup Health & Life Safety PMs  | 1      | 2    |
| 4    | • Setup Health & Life Safety PMs (continued)  | 1      | 2    |
| 5    | • Setup Annual HVAC PM Schedules  | 1      | 2    |
| 6    | • Setup Annual HVAC PM Schedules (continued)  | 1      | 2    |
| 7    | • Setup Semi-Annual HVAC PM Schedules   | 1      | 2    |
| 8    | • Setup Semi-Annual HVAC PM Schedules (continued)   | 1      | 2    |
| 9    | • Setup Quarterly HVAC PM Schedules   | 1      | 2    |
| 10   | • Setup Quarterly HVAC PM Schedules (continued)   | 1      | 2    |
| 11   | • Setup Monthly HVAC PM Schedules   | 1      | 2    |
| 12   | • Setup Monthly HVAC PM Schedules (continued)   | 1      | 2    |
| 13   | • Setup Plumbing PM Schedules   | 1      | 2    |
| 14   | • Setup Plumbing PM Schedules (continued)   | 1      | 2    |
| 15   | • Setup Electrical PM Schedules   | 1      | 2    |
| 16   | • Setup Electrical PM Schedules (continued)   | 1      | 2    |
| 17   | • Setup Interior Finishes PM Schedules  | 1      | 2    |
| 18   | • Setup Exterior Finishes PM Schedules  | 1      | 2    |

| ID | Task Name   | Duration        | Start              | Finish              |
|----|---|-----------------|--------------------|---------------------|
| 1  | <b>South Orange County Community College District</b>                         | <b>231 days</b> | <b>Mon 6/25/12</b> | <b>Thu 5/23/13</b>  |
| 2  | <b>FCA (Including Level 2 for HVAC) / Equipment Inventory</b>                 | <b>231 days</b> | <b>Mon 6/25/12</b> | <b>Thu 5/23/13</b>  |
| 3  | Contract award  | 0 days          | Mon 6/25/12        | Mon 6/25/12         |
| 4  | Initial project team meeting  | 1 day           | Wed 7/25/12        | Wed 7/25/12         |
| 5  | <b>PlanningDirect enhancements (SchoolDude)</b>                               | <b>41 days</b>  | <b>Wed 8/1/12</b>  | <b>Thu 9/27/12</b>  |
| 6  | Enhance PD to interface with FUSION (start based on contract award to SD)     | 40 days         | Wed 8/1/12         | Wed 9/26/12         |
| 7  | Export PD test data to FUSION (SchoolDude & Onuma)                            | 1 day           | Thu 9/27/12        | Thu 9/27/12         |
| 8  | <b>Project Execution (ALPHA)</b>  | <b>204 days</b> | <b>Wed 8/1/12</b>  | <b>Thu 5/23/13</b>  |
| 9  | <b>FCA / Equipment Inventory</b>  | <b>204 days</b> | <b>Wed 8/1/12</b>  | <b>Thu 5/23/13</b>  |
| 10 | Setup buildings in PD   | 5 days          | Wed 8/1/12         | Tue 8/7/12          |
| 11 | <b>Pilot Assessment</b>   | <b>26 days</b>  | <b>Mon 10/1/12</b> | <b>Mon 11/5/12</b>  |
| 12 | Travel to SOCCCD  | 1 day           | Mon 10/1/12        | Mon 10/1/12         |
| 13 | Interview maintenance and management staff (on-going during field activities) | 0.5 days        | Tue 10/2/12        | Tue 10/2/12         |
| 14 | IVC Bldg 3  | 1.5 days        | Tue 10/2/12        | Wed 10/3/12         |
| 15 | SBC Bldg 58   | 2 days          | Thu 10/4/12        | Fri 10/5/12         |
| 16 | Travel home   | 0 days          | Fri 10/5/12        | Fri 10/5/12         |
| 17 | <b>Report</b>   | <b>16 days</b>  | <b>Mon 10/8/12</b> | <b>Mon 10/29/12</b> |
| 18 | Data entry  | 5 days          | Mon 10/8/12        | Fri 10/12/12        |
| 19 | Produce report (focus on data)  | 3 days          | Mon 10/15/12       | Wed 10/17/12        |
| 20 | QC data   | 2 days          | Thu 10/18/12       | Fri 10/19/12        |
| 21 | Submit report to client for review  | 0 days          | Fri 10/19/12       | Fri 10/19/12        |
| 22 | Review report   | 5 days          | Mon 10/22/12       | Fri 10/26/12        |
| 23 | Adjust data collection and business rules as needed                           | 1 day           | Mon 10/29/12       | Mon 10/29/12        |
| 24 | Export PD Pilot data to FUSION  | 5 days          | Tue 10/30/12       | Mon 11/5/12         |
| 25 | <b>FCA / Equipment Inventory</b>  | <b>127 days</b> | <b>Mon 11/5/12</b> | <b>Thu 5/9/13</b>   |
| 26 | Field activities  | 57 days         | Mon 11/5/12        | Thu 1/31/13         |
| 27 | <b>Report</b>   | <b>70 days</b>  | <b>Fri 2/1/13</b>  | <b>Thu 5/9/13</b>   |
| 28 | Data entry  | 20 days         | Fri 2/1/13         | Thu 2/28/13         |
| 29 | Report production   | 10 days         | Fri 3/1/13         | Thu 3/14/13         |
| 30 | QC report   | 10 days         | Fri 3/15/13        | Thu 3/28/13         |
| 31 | Submit draft report to client for review                                      | 0 days          | Thu 3/28/13        | Thu 3/28/13         |
| 32 | Review report   | 15 days         | Fri 3/29/13        | Thu 4/18/13         |
| 33 | Client provide comments   | 0 days          | Thu 4/18/13        | Thu 4/18/13         |
| 34 | Incorporate comments  | 15 days         | Fri 4/19/13        | Thu 5/9/13          |
| 35 | Submit Final Report   | 0 days          | Thu 5/9/13         | Thu 5/9/13          |
| 36 | <b>Export PD data to FUSION (SchoolDude &amp; Onuma)</b>                      | <b>10 days</b>  | <b>Fri 5/10/13</b> | <b>Thu 5/23/13</b>  |
| 37 | Export PD final data to FUSION  | 5 days          | Fri 5/10/13        | Thu 5/16/13         |
| 38 | Validate data transfer  | 5 days          | Fri 5/17/13        | Thu 5/23/13         |