



**Request for Proposals # [274-001-VFS 2019 - 1](#)**

**Title: Vehicle Fleet Information Software System**

**Issue Date: [August 15, 2019](#)**

**Due Date: September 30, 2019  
not later than 3:30 PM ET**

**LATE PROPOSALS WILL NOT BE ACCEPTED**

**Issuing Department: *Engineering Services – (Vehicle Fleet Division)***

**Direct all inquiries concerning this RFP to:**

Travis Brown

Maintenance and Operations Manager

Email: [travis.brown@raleighnc.gov](mailto:travis.brown@raleighnc.gov)

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# 1 Introduction

## 1.1 Purpose

The City of Raleigh's (COR) Vehicle Fleet Services Division is soliciting proposals from qualified firms interested in providing and implementing a web-based software for a Fleet Management Information System (FMIS) capable of storing, managing, and providing management reports on all information pertaining to vehicles and equipment assets. Vendor must provide the ability to receive data from the City's automated Fuel, GPS, and ERP systems. These exchanges must be in electronic form. Proposal will include data conversion (minimum of 3 and maximum of 5 years of data) and migration of data from current FASTER Win database. ([Version 6.09.011](#))

All information related to this solicitation, including any addenda, will be posted to the North Carolina Interactive Purchasing System (IPS) at:

[https://www.ips.state.nc.us/IPS/.](https://www.ips.state.nc.us/IPS/)

## 1.2 Background

The City of Raleigh, the Capital City of North Carolina, remains one of the fastest growing areas in the country. A great economy, top educational institutions, and exceptional health care facilities are some of the characteristics that attract people to the triangle area. The mild climate, diverse work force and proximity to Research Triangle Park combine to make Raleigh a great place to live.

Raleigh is a 21<sup>st</sup> Century City of Innovation focusing on environmental, cultural, and economic sustainability. The City conserves and protects our environmental resources through best practice and cutting-edge conservation and stewardship, land use, infrastructure and building technologies. The City welcomes growth and diversity through policies and programs that will protect and enhance Raleigh's existing neighborhoods, natural amenities, history, and cultural and human resources for future generations. The City leads to improve quality of life for neighborhoods and standard of living for all citizens. The City works with universities, colleges, citizens, and local partners to promote new technology, create new job opportunities, and encourage local businesses and entrepreneurs. The City enlists and prepares 21<sup>st</sup> Century staff with the skill sets to carry out the duties of the City through transparent civic engagement and by providing the very best customer service to our citizens.

Vehicle Fleet Services is a division of the Engineering Services Department and provides maintenance, repair, and automotive support to all City vehicles and motorized equipment except for Fire Department Vehicles. This includes an inventory of approximately 4,500 items which includes vehicles, lawn equipment, trailers, construction equipment, and farm equipment. An internal service fund, the VFS fund serves as an accounting entity to account for the full costs of the City's vehicle service operation. Costs such as fuel, tires, repair, parts, and preventative maintenance services are charged to the respective budget of City departments according to actual use.

The City's Vehicle Fleet has 3 facilities in operation. The facilities are listed below:

1. 2501 Raleigh Boulevard Central Shop
2. 4120 New Bern Avenue Heavy Equipment Shop
3. 7702 Burwell Road Northeast Shop

Currently there are ten active fueling locations as listed below. The Police Service Center downtown location may close in future. The newest locations were set up to provide multiple types of fuel. In addition to fuels, VFS, Solid Waste Services, and North East Remote Operations dispense other vehicle fluids such as motor oil.

1. Police Service Center - 110 S McDowell Street
2. Public Utilities Field Operations - 3304 Lake Woodard Drive
3. Heavy Equipment Shop - 4120 New Bern Avenue
4. Neuse River Treatment Plant - 8500 Battle Bridge Road
5. Parks & Recreational Services - 4225 Daily Road
6. North East Raleigh Police Station - 6716 Six Forks Road
7. Solid Waste Services Wilders Grove - 310 Beacon Lake Drive
8. North East Remote Operations - 7702 Burwell Road
9. Biltmore Propane - 2615 Fitzgerald Drive
10. Vehicle Fleet Services - 2501 Raleigh Boulevard

The current Fleet software is windows based and is approximately 20 years old. The City is proposing to award a contract to purchase a new web-based Fleet Management Information System (FMIS) with data conversion and implementation services.

It is expected the successful contractor will perform the implementation in FY 20.

**1.3 Request for Proposal (RFP) Timeline**

Provided below is a list of the anticipated schedule of events related to this solicitation. The City of Raleigh reserves the right to modify and/or adjust the following schedule to meet the needs of the service. All times shown are Eastern Time (EST):

RFP Process	Date	Time
RFP Advertisement Date	<i>August 15, 2019</i>	
Pre-Proposal Conference (Recommended but Not Mandatory)	<i>August 26, 2019 2:00 PM – 3:00 PM in Conference Room 809, at One Exchange Plaza Building located at 219 Fayetteville Street, Raleigh, NC 27601 on 8th Floor</i>	
Deadline for written questions	<i>September 3, 2019</i>	<i>3:30 AM EST</i>
City Response to questions (anticipated)	<i>September 13, 2019</i>	<i>3:30 PM EST</i>

Proposal Due Date and Time	September 30, 2019	3:30 PM EST
Evaluation Meeting	October 11, 2019	9:30 AM EST
Interview/ Demonstrations (if required)	October 18, 2019	9:30 AM to 12:30 PM EST
Selection Announced at Council Meeting (tentative)	October 31st	9:30 AM EST

**1.4 Pre-Proposal Conference**

A PREPROPOSAL CONFERENCE for all prospective Proposers is scheduled for Monday August 26, 2019 at the One Exchange Plaza Building located at 219 Fayetteville Street, Raleigh, NC 27601 in the 8th floor conference room 809. Attendance at this conference is recommended but is not mandatory for consideration of a Proposer's proposal. Please contact Travis Brown at the following e-mail address [travis.brown@raleighnc.gov](mailto:travis.brown@raleighnc.gov) not later than Friday August 23, 2019, 3:00 PM ET to register. Prospective Proposers are encouraged to submit written questions in advance. A summary of all questions and answers will be posted on the internet as an addendum, located under the RFP #001 – Vehicle Fleet Service 2019-1 being modified. Vendors who would like to phone in to conference should contact Travis by the date and time above and a phone number will be provided.

**1.5 Proposal Questions**

*It is the Proposer's responsibility to ensure that all addenda have been reviewed and considered in the preparation of its proposal.* Requests for clarification and questions to this RFP must be received by the City not later than the date shown above in Section 1.3, entitled "RFP Timeline" for the submittal of written inquiries. The firm's failure to request clarification and submit questions by the date in the RFP Timeline above shall be considered to constitute the firm's acceptance of all City's terms and conditions and requirements. The City shall issue addenda reflecting questions and answers to this RFP, if any, and shall be posted to North Carolina Interactive Purchasing System (IPS). No information, instruction or advice provided orally or informally by any City personnel, whether made in response to a question or otherwise in connection with this RFP, shall be considered authoritative or binding. Respondents shall be entitled to rely *only* on written material contained in an Addendum to this RFP.

**It is important that all Respondents submitting to this RFP periodically check the North Carolina Interactive Purchasing System (IPS) for any Addenda. It is the Respondents responsibility to ensure that all addenda have been reviewed and, if required signed and returned.**

All questions related to this solicitation must be submitted in writing (via email) to the following individual:

Contact Name	Email Address
Travis Brown, Maintenance and Operations Manager	Travis.brown@raleighnc.gov

Questions submitted via telephone will not be answered.

**1.6 Proposal Submission Requirements and Contact Information**

Proposals must follow the format as defined in Section 2 PROPOSALS, and be addressed and submitted as follows:

<b><u>DELIVERED BY US POSTAL SERVICE</u></b>	<b><u>DELIVERED BY ALL OTHER MEANS</u></b>
City of Raleigh ATTN: Travis Brown Vehicle Fleet Services Division 2501 North Raleigh Blvd. Raleigh, NC 27604 RFP No. 001 Vehicle Fleet Service 2019 - 1	City of Raleigh ATTN: Travis Brown Vehicle Fleet Services Division 2501 North Raleigh Blvd. Raleigh, NC 27604 RFP No. 001 Vehicle Fleet Service 2019 - 1

Proposals must be enclosed in an envelope or package and clearly marked with the name of the submitting company, the *RFP number* and the *RFP Title*. Proposers must submit:

- A. one (1) signed original;
- B. one (1) electronic version of the signed proposal and;
- C. Six (6) copies of proposal.

The electronic version of the Proposal must be submitted as a viewable and printable Adobe Portable Document File (PDF) on a Flash Drive. Both hard copy and electronic versions must be received by the City on or before the RFP due date and time provided in Section 1.3. Proposals received after the RFP due date and time will not be considered and will be returned unopened to the return address on the submission envelope or package.

Any requirements in the RFP that cannot be met must be indicated on Appendix V, "Exceptions to the RFP" and submitted with proposal. Proposers must respond to the entire Request for Proposals (RFP). Any incomplete proposal may be eliminated from competition at the discretion of the City of Raleigh. The City reserves the right to reject any or all proposals for any reason and to waive any informality it deems in its best interest.

Proposals that arrive after the due date and time will not be accepted or considered for any reason whatsoever. If the Firm elects to mail in its response, the Firm must allow sufficient time to ensure the City's proper receipt of the package by the time specified in Section 1.3, "RFP Timeline". Regardless of the delivery method, it is the responsibility of the Firm to ensure that their response arrives at the designated location specified in this Section by the due date and time specified in Section 1.3, "RFP Timeline".

**1.7 Rights to Submitted Material**

All proposals and supporting materials, as well as correspondence relating to this

RFP, shall become the property of the City. The content of all submittals will be held confidential until the selection of the firm is made. Proposals will be reviewed by the Evaluation Team, as well as other City staff and members of the general public who submit public record requests. *Any proprietary data must be clearly marked.* In submitting a Proposal, each Prospective Proposer agrees that the City may reveal any trade secret materials contained in such response to all City staff and City officials involved in the selection process and to any outside consultant or other third party who serves on the Evaluation Team or who is hired by the City to assist in the selection process.

The City reserves the right to retain all proposals submitted and to use any ideas in a proposal regardless of whether that proposal is selected. Submission of a proposal indicates acceptance by the Proposer of the conditions contained in this Request for Proposal.

Proposals marked entirely as “confidential”, “proprietary”, or “trade secret” will be considered non-responsive and will be removed from the evaluation process.

### **1.8 Communications**

All communications of any nature regarding this RFP with any City staff, elected City officials, evaluation committee members, are strictly forbidden from the time the solicitation is publicly posted until award. Questions must be submitted in writing to the individual designated in Section 1.1. prior to the deadline provided in Section 1.3.

Violation of this provision may result in the firm’s proposal being removed from consideration.

### **1.9 Lobbying**

By responding to this solicitation, the firm certifies that is has not and will not pay any person or firm to influence or attempt to influence an officer or employee of the City or the State of North Carolina, or any elected official in connection with obtaining a contract as a result of this RFP.

### **1.10 Conflicts of Interest**

City of Raleigh contracts are controlled by three conflict of interest provisions.

First, federal procurement standards provide in 2 CFR 200.318 (c)(1),

No employee, officer, or agent may participate in the selection, award, or administration of a contract supported by a Federal award if he or she has a real or apparent conflict of interest. Such a conflict of interest would arise when the employee, officer, or agent, any member of his or her immediate family, his or her partner, or a firm which employs or is about to employ any of the parties indicated herein, has a financial or other interest in or a tangible personal benefit from a firm considered for a contract. The officers, employees, and agents of the non-Federal entity may neither solicit nor accept gratuities, favors, or anything of monetary value from contractors or parties to subcontracts.



Similarly, the North Carolina General Statutes provides a *criminal* statute for conflicts of interest in public contracting. N.C.G.S. § 14-234(a):

(1) No public officer or employee who is involved in making or administering a contract on behalf of a public agency may derive a direct benefit from the contract except as provided in this section, or as otherwise allowed by law. (2) A public officer or employee who will derive a direct benefit from a contract with the public agency he or she serves, but who is not involved in making or administering the contract, shall not attempt to influence any other person who is involved in making or administering the contract. (3) No public officer or employee may solicit or receive any gift, favor, reward, service, or promise of reward, including a promise of future employment, in exchange for recommending, influencing, or attempting to influence the award of a contract by the public agency he or she serves.

City of Raleigh Charter Section 3.9 regulates private transactions between the City and its officials and employees. The Charter states:

"No member of the City Council, official, or employee of the City of Raleigh shall be financially interested, or have any personal beneficial interest, either directly or indirectly, as agent, representative, or otherwise, in the purchase of, or contract for, or in furnishing any materials, equipment or supplies to the City of Raleigh, nor shall any official or employee of the City of Raleigh accept or receive, or agree to accept or receive, directly or indirectly, from any person, firm or corporation to whom any contract may be awarded or from whom any materials, equipment or supplies may be purchased by the City of Raleigh, by rebate, gift, or otherwise, any money or anything of value whatsoever, or any promise, obligation or contract for future reward or compensation, for recommending or procuring the uses of any such materials, equipment or supplies by the City of Raleigh; no member of the City Council, official or employee of the City of Raleigh shall for his own personal benefit operate, directly or indirectly, any concession in any building or on any lands of the City of Raleigh, nor shall any official or employee of the City of Raleigh bid for or be awarded any contract granting concessionary rights of any nature or kind from the City of Raleigh; it shall be unlawful for any member of the City Council, official or employee of the City of Raleigh to bid for or to purchase or to contract to purchase from the City of Raleigh any real estate, equipment, materials, or supplies of any nature or kind whatsoever, either directly or indirectly, at either public or private sale, either singly, or through or jointly with any other person."

### **1.11 Proposer Expenses**

The City of Raleigh will not be responsible for any expenses incurred by any Proposer in the development of a response to this Request for Proposal or any other activities associated with this procurement including but not limited to any onsite (or otherwise) interviews and/or presentations, and/or supplemental information provided, submitted, or given to City of Raleigh and/or its representatives. Further, the City of Raleigh shall reserve the right to cancel the work described herein prior to issuance and acceptance of any contractual agreement/purchase order by the recommended Proposer even if the awarding authority for each entity has formally accepted a recommendation.

### **1.12 Proposer Acceptance**

Submission of any proposal indicates a Proposer's acceptance of the conditions contained in this RFP unless clearly and specifically noted otherwise on Appendix V, "Exceptions to RFP" and submitted with proposal. Furthermore, the City of Raleigh is not bound to accept a proposal on the basis of lowest price, and further, the City of Raleigh has the sole discretion and reserves the right to cancel this RFP, and to reject any and all proposals, to waive any and all informalities and/or irregularities, or to re-advertise with either the identical or revised specifications, if it is deemed to be in the City of Raleigh's best interests to do so. The City of Raleigh reserves the right to accept or reject any or all of the items in the proposal, and to award the contract in whole or in part and/or negotiate any or all items with individual Proposers if it is deemed in the City of Raleigh's best interest. Moreover, the City of Raleigh reserves the right to make no selection if proposals are deemed to be outside the fiscal constraint or not in the best interest of the City of Raleigh.

## 2 PROPOSALS

Responses must follow the format outlined below. The City may reject as non-responsive at its sole discretion any proposal that does not provide complete and/or adequate responses or departs in any substantial way from the required format.

### 2.1 Request for Proposals Required Document Format

Responses should be divided using tabs to separate each section, listed sequentially as follows:

#### Tab 1: Cover Letter

Provide an introduction letter summarizing the unique proposal of your firm to meet the needs of this service requirement. This letter should be presented on the firm's official letterhead and signed by an authorized representative who has the authority to enter into a contract with the City on behalf of the firm. Additionally, include the name, address, telephone and email address of the individual who serves as the point of contact for this solicitation.

#### Tab 2: Corporate Background and Experience

Include background information on the firm and provide detailed information regarding the firm's experience with similar projects. Provide a list of all similar contracts performed in the past five years, accompanied by at least three (3) references (contact persons, firm, telephone number and email address).

Include the total amount invoiced for each listed project, the length of the project, and list of those involved in the project who are also proposed for the subject project named in this solicitation. Failure to provide a list of all similar contracts in the specified period may result in the rejection of the firm's proposal. The evaluation team reserves the right to contact any or all listed references, and to contact other public entities regarding past performance on similar projects.

#### Tab 3: Financial Information

Recent audited or reviewed financial statements prepared by an independent certified public accountant (CPA) that shall include, at a minimum, a balance sheet, income statement (i.e., profit/loss statement) and cash flow statement **and**, if the audited or reviewed financial statements were prepared more than six (6) months prior to the issuance of this RFP, the Proposer shall submit its most recent internal financial statements (balance sheet, income statement and cash flow statement or budget with entries reflecting revenues and expenditures from the date of the audited or reviewed financial statements to the end of the most recent financial reporting period (i.e., the quarter or month preceding the issuance date of this RFP)).

OR

Recent compiled financial statements prepared by an independent CPA that shall include, at a minimum, a balance sheet, income statement (i.e., profit/loss statement) and cash flow statement **and**, if the compiled financial statements were

prepared more than three (3) months prior to the issuance of this RFP, the Proposer shall submit its most recent internal financial statements (balance sheet, income statement and cash flow statement or budget with entries reflecting revenues and expenditures to date), and other evidence of financial stability such as most recently filed income tax return, evidence of a line of credit/loans/other type of financing with statement of amount in use/outstanding balance (e.g., a complete copy commitment letter, loan agreement, billing statement reflecting the line of credit or statement from lender acknowledging the commitment to fund the Proposer's stated financing), personal guaranty with copies of personal income tax filing and statement of net worth or such other evidence that is accurate, reliable and trustworthy regarding the Proposer's financial stability.

All financial information, statements and/or documents provided in response to this solicitation shall be kept confidential provided that EACH PAGE is marked as follows: "CONFIDENTIAL – DO NOT DISCLOSE EXCEPT FOR THE EXPRESS PURPOSE OF PROPOSAL EVALUATION. "

**"Recent"** shall be defined as financial statements that were prepared within the 12 months preceding the issuance date of this RFP.

**Consolidated financial statements** of the Proposer's parent or related corporation/business entity shall not be considered, unless: (1) the Proposer's actual financial performance for the designated period is separately identified in and/or attached to the consolidated statements, (2) the parent or related corporation/business entity provides the State with a document wherein the parent or related corporation/business entity will be financially responsible for the Proposer's performance of the contract and the consolidated statement demonstrates the parent or related corporation's/business entity's financial ability to perform the contract, financial stability and/or such other financial considerations identified in the evaluation criteria; and/or (3) Proposer provides its own internally prepared financial statements and such other evidence of its own financial stability identified above.

The firm's failure to provide any of the above-referenced financial statements may result in the proposal being removed from consideration. Proposers are also encouraged to explain any negative financial information, and to provide documentation supporting those explanations and demonstrating the financial strength of the firm.

**Tab 4: Project Understanding, Approach and Schedule**

Provide a comprehensive narrative, outline, and/or graph demonstrating the firm's understanding and approach to accomplishing the tasks outlined in the Scope of Work section of this RFP. A description of each task and deliverable and the schedule for accomplishing each shall be included.

**Tab 5: Team Firm, Experience and Certifications**

This section must include the proposed staffing, deployment and firm of personnel to be assigned to this project. The Proposer shall provide information as to the Proposals and experience of all executive, managerial, legal, and professional personnel to be assigned to this project, including resumes citing experience with similar projects and the responsibilities to be assigned to each person. A project-specific firm chart which clearly illustrates the roles, responsibilities, and the reporting relationships of each team member should be included.

**Tab 6: Cost**

In a separate sealed envelope provide a minimum of three (3) complete copies of cost schedule. Hourly rates shall be fully burdened to include all costs, all applicable overhead and profit (including lodging, meals, and transportation). Attach any additional pricing details.

**2.2 RFP Documents**

This RFP is comprised of the base RFP document, any attachments, and any addenda released before Contract award. All attachments and addenda released for this RFP in advance of any Contract award are incorporated herein by reference.

**3 PROPOSAL EVALUATION**

**3.1 Proposal Evaluation Criteria (Stage 1)**

This is not a bid. There will not be a public opening. The Proposals received in response to this RFP for information technology goods and services, in accordance with N.C.G.S. 143-129.8, will be evaluated and ranked, by the Proposal Evaluation Committee in accordance with the process and evaluation criteria contained below. Responses will be evaluated considering the material and substantiating evidence presented in the response, and not on the basis of what is inferred. After thoroughly reading and reviewing this RFP, each Evaluation committee member shall conduct his or her independent evaluation of the proposals received and grade the responses on their merit in accordance with the evaluation criteria set forth in the following table.

The maximum interview/demonstration points a Proposer can receive is 5 points. The Proposers selected for interviews/demonstrations under this section will be notified in writing of the date and time. The Proposers' interview/demonstrations shall be based solely upon information provided in each Proposer's original proposal. No new information may be presented.

<b>Criteria</b>	<b>(a) Weight</b>	<b>(b) Score (0-3)</b>	<b>(a) x (b) Weighted Score</b>
Corporate Background and Experience	15		
Firm Financial Stability	15		

Project Understanding & Approach	20		
Functionality	20		
Team Firm Experience	10		
Proposed Cost	15		
<b>Total Score (without Interview/Demonstrations)</b>			
Interview/Demonstration (if applicable)	5		
<b>Final Score (with Interview/Demonstrations)</b>			

**Score Points**

0- Missing or Does Not Meet Expectation

1- Partially Meets Expectation

2- Meets Expectation

3- Exceeds Expectation

**Cost Formula:** The cost criterion is rated by giving the proposal with the lowest total cost the maximum number of Cost points available. The remaining proposals are rated by applying the following formula:

$$1 - \frac{B - A}{A} \times C = D$$

A—the lowest Proposer’s cost.

B—the Proposer’s cost being scored.

C—the maximum number of cost points available.

D—Proposer’s cost score (points).

Note: If the formula results in a negative number (which will occur when the Offeror’s cost is more than twice the lowest cost), zero points shall be assigned.

**3.2 Interview/Demonstration (Stage 2)**

A short-list of firms may be invited to Stage 2 of the evaluation process, the *Interview/ Demonstration*. Interview/demonstrations are an important aspect of the evaluation process that offers the City an opportunity to see how the proposer’s solution meets the critical components of the RFP.

**3.3 Final Selection**

Proposals will be evaluated and ranked according to the criteria and weighted values set forth in section 3.1. Either a final selection for recommendation will be made at this time or the short-list of firms will be invited to participate in Stage 2 of the evaluation process. If Stage 2 is implemented, each firm will be evaluated and assigned a score to determine the best firm for recommendation.

After which negotiations of a contract with the most qualified firm will commence. If negotiations are unsuccessful, the City will then pursue negotiations with the next most qualified firm. All Proposers will be notified of their standing immediately following the City’s decision.

The City shall not be bound or in any way obligated until both parties have executed a contract. The City also reserves the right to delay the award of a contract or to not award a contract.

### **3.4 Notice to Proposers Regarding RFP Terms and Conditions**

It shall be the Proposer's responsibility to read the Instructions, the City's contract terms (Appendix IV), all relevant exhibits, attachments, and any other components made a part of this RFP and comply with all requirements and specifications herein. Proposers are also responsible for obtaining and complying with all Addenda and other changes that may be issued in connection with this RFP.

## **4 CONTRACT TERMS**

The Contract shall have an initial term of one year, beginning on the date of the Contract award (the "Effective Date"). At the end of the Contract's current term, the City shall have the option, in its sole discretion, to renew the Contract on the same terms and conditions for up to a total of 6 additional one-year terms. The City will give the Contractor written notice of its intent whether to exercise each option no later than 90 days before the end of the Contract's then-current term. In addition, the City reserves the right to extend a contract term for a period of up to 180 days in 90-day-or-less increments.

## **5 SCOPE OF SERVICES**

Awarded Contractor shall provide services, all as set forth in this RFP and more particularly described in this Section 5.

The City of Raleigh Vehicle Fleet Services Division is looking to upgrade their current FASTER Win Version (6.09.011) fleet software to a web-based software for a Fleet Management Information System (FMIS). This Request for Proposal includes the purchase, installation, integration, training, project management, data conversion and implementation of the system within 5 months of the contract date. The City will look at both Vendor and City hosted systems. The Vendor shall list their preferred Fuel, GPS, and Financial software interfaces.

The Vendor will provide a comprehensive proposal with Project Management services to include onsite installation, data conversion, training of all software and components, technical support, future upgrades, as well as appropriate deployment assistance to ensure the system is properly implemented within the agreed upon time frame. The objectives of this implementation are as follows:

1. Provide data conversion services for all existing FASTER Win data to be used in the new web-based system. At a minimum the solution should support the following web browsers: Mozilla FireFox 68, Chrome 64 Bit- v75.0.3770.142. IE 11.829217134.0
2. Implement new Web based FMIS software Vendor or City Hosted that will enable VFS to effectively manage all active, disabled, and retired assets.

3. Provide maintenance, updates, and support program and services for continuing support of software.
4. Provide Interfaces with the following City software: Fuel Master's Syntech Fuel system, Finance module version 9.2 on premise system (Peoplesoft ERP System), Invers Motor Pool system, Grayco's Matrix lubrication system, GEO tab, and Verizon GPS systems.
5. Provide a Vendor Hosted solution for Disaster Recovery.
6. Real time Management, Query, and Ad Hoc reporting capability for system analysis, problem resolution, statistical data, and overall efficiency.
7. Provide on-site training classes for all VFS employees and up to 20 employees from various City departments using the system.
8. Project Startup meeting and weekly status meetings throughout project.
9. Must provide 24/7 phone support with toll-free number.
10. Provide user online user help system and electronic user manuals for system.
11. Provide all equipment, labor, materials, and services as necessary to complete work identified in the scope of work.

### **Deliverables to Include:**

#### **5.1 Project Startup Meetings**

At the start of project, the contractor will be required to meet with the City Vehicle Fleet Services Management, IT, and Finance Departments to gain understanding of the fleet operations, data, and concerns. The contractor will work with the City Enterprise Project Management Office, to draft a project schedule that reflects both vendor and City tasks. The contractor shall have no administrative authority. The City shall provide all available fleet data on existing FASTER system.

#### **5.2 Status Meetings**

Vendor, in coordination with City of Raleigh Enterprise IT Project Manager, will hold weekly status meetings to ensure project is on schedule and address any issues that may arise.

#### **5.3 Data conversion and setup**

Vendor will be responsible for Conversion of all existing current data.

#### **5.4 Statement of Work**

Vendor shall provide SOW on all activities, timelines, and deliverables to City before start of project.

#### **5.5 Project Management Plan**

The Project Management Plan will be developed in coordination with City's Project Manager and include all phases of Data Conversion, Set-up, Training, Installation, and Implementation to completion.



## 5.6 Data Conversion Plan

Vendor will work in conjunction with City VFS and IT personnel to develop a detailed data conversion plan to bring a minimum of 3 and maximum of 5 years of data from current FASTER Win data base Version 6.09.011 into new system.

## 5.7 Testing Plan

Vendor will develop testing plan to ensure data is being converted correctly and software is performing in the proper manner before going live date. The testing plan must be reviewed and approved by the City of Raleigh.

## 5.8 Software Installation and setup

Vendor will develop plan to install FMIS software and any setup that is required.

## 5.9 Training

Vendor will provide training plan to make sure all VFS staff including technicians, IT, Supervisors, and Management receive adequate training and documentation before going live date.

## 5.10 Software License

Vendor will provide any applicable software licenses to the City of Raleigh.

# 6 SYSTEM FUNCTIONALITY

*Please respond fully to each item. Omissions and/or incomplete answers will be deemed non-responsive.*

**Please respond to each specification as indicated below:**

- Y** Yes – the system currently meets this requirement and is included with the standard program at no additional cost.
- AO** Addon – yes, the system currently meets this requirement with an add-on that is fully integrated. Provide a description and cost in the comments section.
- UD** Under Development – provide a description and anticipated release date.
- MN** Modification necessary to meet this specification or the system provides this functionality in a different way. Provide a description and any additional costs in the comments section.
- C** Customized Services – this can be accomplished through customized services. Please provide a not-to-exceed cost.
- N** No – system does not meet and has no plans to meet this requirement.

Each specification is listed as:

**M** Mandatory - this specification must be met. Any exceptions must be included on the exception list.

**D** Desirable - this specification is an optional or desired feature.

The responses to each specification will be assigned a point value by the evaluation committee from 0 – 3 as described below:

**3** Exceeds expectations in the rated area.

**2** Meets all expectations in the rated area.

**1** Meets some but not all expectations in the rated area.

**0** Does not meet expectations in the rated area or insufficient information.

From the written material presented, the specifications will be assigned point scores based upon their ability to address the desired feature or defined task. By multiplying the points awarded by a predetermined weight factor for each criterion the total points will be calculated.

**6.1 General Requirements**

	<b>Specifications</b>	<b>M/D</b>	<b>Response</b>	<b>Comments</b>
<i>The system should:</i>				
<b>1.</b>	Use codes stored in data tables that can be accessed, viewed and modified by users with appropriate levels of permission.	<b>M</b>		
<b>2.</b>	Utilize ATA/VMRS repair codes and APWA or NAFA asset class codes	<b>M</b>		
<b>3.</b>	Flexible role-based security model to customize user access.	<b>M</b>		
<b>4.</b>	Support multiple deployments. Describe deployment options (i.e. hosted	<b>M</b>		

	by vendor or hosted by the city) and provide a detailed list of additional software and hardware necessary to support each option.			
5.	Support a Microsoft SQL relational database management system. Please list databases supported.	<b>M</b>		
6.	Be capable of interfacing with other applications such as automated fuel vending -Syntech, GPS - Geotab/Verizon, Motor Pool – Invers and accounting system - Peoplesoft. import/export functions to excel, Adobe, and Public Fleet Fuel Card Systems	<b>M</b>		
7.	Be capable of exporting account number Data with up to 60 alpha numeric characters to Peoplesoft with the following format Fund (5), Account (6), Depart (4), Program (5), Cost Center (5), PC BU (6), Project (10), Undefined (9), Undefined (10).	<b>M</b>		
8.	Browser base clients with certified browsers Internet Explorer 11, Mozilla	<b>M</b>		

	FireFox 68, Chrome 64 Bit			
9.	Use real-time processing where all files affected by a transaction are updated at the time of the actual transaction without the need for batch processing.	M		
10.	Be an off-the-shelf package with user definable configuration allowing flexibility to match site specific processes for use by a public fleet.	M		
11.	The ability to allow users to store additional information related to asset, parts or work order records by providing the option of attaching images and/or .pdfs to the record.	M		
12.	Employ a standard graphical user interface (GUI) based on industry standard screen design techniques and principles.	M		
13.	Software must have spell check capability in notes fields.	M		
14.	Include updated documentation and necessary scripts for any database structure changes.	M		
15.	Real time access to database.	M		
16.	Support SQL Reporting Services.	M		

17.	Be work order based and capable of printing detailed copies of all work.	<b>M</b>		
18.	Provide easy navigation within the application using standard Web functionality that allows multiple windows to be display simultaneously.	<b>M</b>		
19.	Provide drop down lists for all codes displaying the description.	<b>M</b>		
20.	Provide “real time” work in progress screens that display work order statuses, assigned tasks, location of work and assigned labor.	<b>M</b>		
21.	Provide date fields selectable from a dropdown calendar	<b>M</b>		
22.	Includes a “Help” button within the application	<b>M</b>		
23.	Must be an off the Shelf (COTS) system designed for the public sector	<b>M</b>		
24.	Must be developed on current platforms and technology. State the industry standard programming language.	<b>M</b>		
25.	Software and database can be hosted internally on city servers or externally by Vendor	<b>M</b>		
26.	Software must be a true municipal fleet software with little to	<b>M</b>		

	none customization required			
<b>27.</b>	Ability to store link attachments (graphics) in the database or on a network share.	<b>M</b>		
<b>28.</b>	Full integration capability in a variety of methods including web services for items like finance and purchasing.	<b>M</b>		
<b>29.</b>	Must have capability to include a snapshot picture of the asset on the master asset record for ease of reference	<b>M</b>		
<b>30.</b>	Each module must have a default dashboard	<b>M</b>		
<b>31.</b>	Conversion of a minimum of 3 and maximum of 5 years of data from current FASTER system	<b>M</b>		

## 6.2 Asset Management

	Specifications	M/D	Response	Comments
1.	<p><i>The system should:</i></p> <p>Maintain all pertinent data on each piece of equipment including but not limited to the following fields:</p> <ul style="list-style-type: none"> <li>■ <b>Asset Number</b> a unique number which identifies equipment</li> <li>■ <b>Fleet Number</b> a second unique number available to track an asset.</li> <li>■ <b>Year</b></li> <li>■ <b>Make</b></li> <li>■ <b>Model</b></li> <li>■ <b>Drive Train</b></li> <li>■ <b>VIN/Serial Number</b> unique number</li> <li>■ <b>License</b> unique number for license plate</li> <li>■ <b>Class</b></li> <li>■ <b>GVW</b></li> <li>■ <b>Body Serial Number</b></li> <li>■ <b>Chassis Serial Number</b></li> <li>■ <b>Department</b></li> <li>■ <b>Billing Code</b> billing code to define how costs captured for this piece of equipment are to be billed. Multiple user defined billing schemes must be supported.</li> <li>■ <b>Color</b></li> <li>■ <b>Location Code</b> (Parking slot)</li> <li>■ <b>Monitor Group</b></li> <li>■ <b>Site</b> address where asset is stored</li> <li>■ <b>Priority</b> level of importance of the asset</li> <li>■ <b>Availability</b> hours and days an asset is available for use</li> </ul>	M		

	<ul style="list-style-type: none"> <li>■ <b>Picture of asset on main record screen</b></li> <li>■ <b>Open Work Order Link</b> to navigate directly to the work order.</li> <li>■ <b>Department</b></li> <li>■ <b>GPS</b></li> <li>■ <b>Motor Pool</b></li> <li>■ <b>Company (ex. 001, 002, 003.... 009 Undefined.)</b></li> <li>■ <b>Meter Readings – Miles and Hours</b></li> <li>■ <b>Acquisition Date, Cost</b></li> <li>■ <b>Disposal Date, Cost</b></li> <li>■ <b>Depreciation Value</b></li> <li>■ <b>Parent / Child Capability</b></li> <li>■ <b>Status – Active, Retired, Surplus, etc.</b></li> </ul>			
2.	Support an optional equipment-specific labor rate for automatically calculating billing hours.	<b>M</b>		
3.	Provide asset management from Acquisition Planning through Disposal.	<b>M</b>		
4.	Easy access to at-a-glance snapshot information for a given asset including things such as most recent PM, meter reading, work order and lifecycle costing.	<b>M</b>		
5.	Ability to control the type and size of the graphics attached throughout the system.	<b>M</b>		
6.	Ability to track multiple engines	<b>M</b>		
7.	Four (4) fuel types	<b>M</b>		
8.	Tire tracking.	<b>M</b>		
9.	Billing can be set up to the individual asset	<b>M</b>		



10.	Lifecycle tracking including a point value replacement system	M		
11.	Tracking of Scheduled Actions per asset (such as vehicle registrations, emissions testing, inspections, etc.)	M		
12.	Contacts to track anyone and everyone related to a piece of equipment with the ability to specify custom roles related to assets and start and end dates for their connection to the asset.	M		
13.	<p>Online display of historical cost information for each asset. Ability to export historical information from online display to Excel and Word.</p> <ul style="list-style-type: none"> <li>▪ Fuel Cost</li> <li>▪ Maintenance Cost</li> <li>▪ Warranty Cost</li> <li>▪ Repair Cost</li> <li>▪ Credits</li> <li>▪ MPG</li> <li>▪ COST per Gallon</li> <li>▪ Total Cost per Mile</li> <li>▪ Total Cost of Operation</li> </ul>	M		
14.	Display on the equipment screen all parts issued and the last date issued for each piece of equipment.	M		
15.	Provide the ability to define availability of each individual asset by hours, days, and holidays.	M		
16.	Provide unlimited user defined asset/equipment usage codes.	M		
17.	Provide the ability to attach components expandable to multiple	M		

	levels to an asset while maintaining a full asset record, warranties and PM schedules for each.			
18.	Ability to track notes related to assets with subject lines for easy searching.	M		
19.	Have the ability to change an asset number and maintain all relevant data with the record.	M		
20.	Track unlimited number of different fuel types for one asset record.	M		
21.	<p>Provide the following fields for the capture of acquisition and disposal information for each asset record:</p> <ul style="list-style-type: none"> <li>■ <b>Acquire Date</b> ex. 02/21/2000</li> <li>■ <b>Acquire Cost</b></li> <li>■ <b>Acquire Vendor</b></li> <li>■ <b>PO Number</b></li> <li>■ <b>Title Number</b></li> <li>■ <b>In Service Date</b></li> <li>■ <b>Life Expectancy Months</b></li> <li>■ <b>Out of Service Date</b></li> <li>■ <b>Disposal Date</b></li> <li>■ <b>Replaced Asset Number</b></li> <li>■ <b>Disposal Cost captured</b></li> <li>■ <b>Dispose Vendor</b></li> <li>■ <b>Sale Proceeds</b></li> <li>■ <b>Capitalized Cost</b></li> </ul>	M		
22.	<p>Track multiple meter types and provide the ability to capture the following meter readings.</p> <ul style="list-style-type: none"> <li>■ Actual Meter Reading</li> <li>■ Meter Reading at Acquisition</li> </ul>	M		

	<ul style="list-style-type: none"> <li>■ Begin Fiscal Year Meter</li> <li>■ Life Expectancy by M/H</li> <li>■ Year to Date</li> <li>■ Life to Date</li> </ul>			
23.	Provide the ability to replace a meter and maintain both actual and life-to-date meter reading.	M		
24.	Support the ability to bill each asset by multiple cost categories in user defined combinations of parts, labor, sublets, mileage, billing period charges, fuel, and replacement recovery.	M		
25.	Support multiple mark ups for parts, labor, fuel and sublets and Administration.	M		
26.	Track unlimited warranties for each asset by expiration date, cost, vendor, and any deductible or cost for the warranty.	M		
27.	Provide unlimited user defined codes that can be assigned by asset or by groups of assets.	M		
28.	Provide the ability to assign both credit and debit account numbers to an asset and ability to modify with permissions.	M		
29.	Track changes in departmental ownership.	M		
30.	Store billing period charges for historical review, reproduction and reports.	M		
31.	<p><b>Preventative Maintenance</b></p> <ol style="list-style-type: none"> <li>1. Track unlimited PM cycles for each piece of equipment in any combination by time,</li> </ol>	M		

	<p>meters, fuel consumption, a set monthly date, or a set annual date.</p> <ol style="list-style-type: none"> <li>2. Automatically update the next PM due when each job has been completed.</li> <li>3. Allow users to define the update process for calculation of next PM due using the actual transaction date and current meter or previous date and meter.</li> <li>4. Provide ability to establish a hierarchy for PM services and define the highest level for the grouping.</li> <li>5. Easily create a shop schedule for a list of PMs due.</li> <li>6. Allow the user to define what working days will be included on the schedule.</li> <li>7. Provide the ability to define the total number and type of PM services included on the schedule.</li> <li>8. Provide the ability to create a PM services repair record from the PM due listing.</li> </ol>			
32.	<p>Provide for tracking state inspections, annual renewals, smog inspections and any other site-specific inspections.</p>	<b>M</b>		
33.	<p><b>Vehicle Replacement</b></p> <p>Provide an online vehicle replacement program that displays vehicle replacement information calculated and captured from other locations in the system and provides reporting capability. Includes the following:</p> <ul style="list-style-type: none"> <li>■ <b>Date:</b> date that the equipment was put in service.</li> </ul>	<b>M</b>		

	<ul style="list-style-type: none"> <li>■ <b>Cost:</b> amount of money paid to acquire the equipment.</li> <li>■ <b>Maint \$ LTD:</b> the maintenance dollars spent to date.</li> <li>■ <b>Inflation Rate:</b> estimated inflation rate for the equipment.</li> <li>■ <b>Salvage Rate:</b> the expected percentage of the cost that the user will get at the time the unit is sold or salvaged. This dollar amount is subtracted from the total cost of replacement.</li> <li>■ <b>Fund:</b> budgetary funding code for replacement of equipment.</li> <li>■ <b>Major Grouping:</b> administrative level group funding code.</li> <li>■ <b>Expected Life in Meters:</b> shows the expected life from all valid meters attached to the equipment.</li> <li>■ <b>Expected Life in Months:</b> the expected time, in months, that the equipment should last before replacement is necessary.</li> <li>■ <b>Recovery Collected:</b> life to Date amount of recovery collected through the billing process or separate update program.</li> <li>■ <b>Condition Factor:</b> subjective administrative level input toward equipment replacement program.</li> </ul>			
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34.	<p>Automatically add to the acquisition cost any capitalization maintenance.</p> <ul style="list-style-type: none"> <li>■ These costs should be tracked separately from maintenance and repair costs.</li> <li>■ Vehicle replacement automatically recalculates when capitol repairs are added.</li> </ul>	<b>M</b>		
35.	<p>Provides for online display of historical information for each piece of equipment including:</p> <p>a. Monthly or yearly totals by fiscal year or calendar year for:</p> <ul style="list-style-type: none"> <li>■ Fuel costs and quantity</li> <li>■ Meter type and cost/meter</li> <li>■ Parts</li> <li>■ Labor</li> <li>■ Sublet</li> <li>■ Credit</li> <li>■ Accident</li> </ul> <p>b. All parts issued to the equipment.</p>	<b>M</b>		
36.	<p>Display the following history fields by month or year:</p> <ul style="list-style-type: none"> <li>■ <b>Total Maintenance and Repair:</b> the total maintenance and repair dollars spent on this equipment.</li> <li>■ <b>Maintenance:</b> the dollars spent on parts,</li> </ul>	<b>M</b>		

	<p>labor and sublet costs for PM's.</p> <ul style="list-style-type: none"> <li>■ <b>Repair:</b> dollars spent on parts, labor and sublet costs for all other repairs (non-PM's and non-accident repairs).</li> <li>■ <b>Accident:</b> dollars spent on parts, labor and sublet costs for accident repairs.</li> <li>■ <b>Capital:</b> dollars spent on parts, labor and sublet costs for capital repairs.</li> <li>■ <b>Other Costs:</b> dollars spent for work order miscellaneous costs such as shop supplies, environmental fees, etc.</li> <li>■ <b>Fuel Cost:</b> costs associated with fuel.</li> <li>■ <b>Fuel Qty:</b> quantity of fuel used for the month or year.</li> <li>■ <b>Meter:</b> type of meter.</li> <li>■ <b>Meter Driven</b> actual meter units driven during the queried time frame.</li> <li>■ <b>Idle Hours</b> Record of the hours the asset was operational at idle</li> <li>■ <b>Cost/Meter:</b> costs attributed to this meter [(Maintenance + Repair)/Meter reading].</li> <li>■ <b>Meter/Gallon:</b> costs of meter per gallon (Meter Reading/Fuel Qty.)</li> <li>■ <b>Parts:</b> total dollars spent on parts for this equipment for selected period (not PM or accident part costs).</li> </ul>			
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	<ul style="list-style-type: none"> <li>■ <b>Labor:</b> total dollars spent on labor for selected period.</li> <li>■ <b>Sublet:</b> total dollars spent on sublet costs for this piece of equipment for selected period.</li> <li>■ <b>Credit:</b> total number of credit dollars given on this piece of equipment.</li> <li>■ <b>Accident:</b> total dollars from accidents.</li> <li>■ <b>Other Fluid:</b> amount of other fluids used in this equipment for the selected period.</li> </ul>			
37.	Provide the ability to recuperate the costs of special tools and training needed for equipment through the use of an equipment specific labor rate that is automatically used when maintenance is performed.	<b>D</b>		
38.	A custom specification section with the ability to add, edit, view and delete custom information.	<b>M</b>		
39.	Link equipment warranties to repair codes for tracking warranty cost information.	<b>M</b>		
40.	Track equipment warranties from the initial claims to re-imbursements received.	<b>M</b>		
41.	Provide direct access to unlimited stored images associated with the piece of equipment. Images can be stored in the database or on a network share.	<b>M</b>		
42.	Ability to add multiple equipment records from a template including standard fields, PM	<b>M</b>		



	Schedules & Warranty Schedules.			
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### 6.3 Preventative Management

	Specification	M/D	Response	Comments
<i>The system should:</i>				
1.	Generate a PM/annual/semiannual inspection due list by department, class, shop, or date.	M		
2.	Support PM frequency by time, miles/hours, fuel consumed, or any combination thereof.	M		
3.	Automatically update when the next PM is due upon completion of the current PM.	D		
4.	Provide for PM scheduling that supports differences in age, usage and manufacturer.	M		
5.	Allow for unlimited PM's and frequency of service for each piece of equipment.	M		
6.	Track unlimited PMs for all components.	M		
7.	Provide an option for hierarchical scheduling of PMs.	M		
8.	Adjust for early/late hierarchically scheduled PM services.	M		
9.	Include all associated components in a PM due report.	M		
10.	Provide the ability for flexible PM scheduling based on	M		

	shift and shop capacity.			
<b>11.</b>	Provide the ability to manage or modify scheduled PMs.	<b>M</b>		
<b>12.</b>	Provide Parent/Child PM capability to schedule PM on two pieces of equipment that are attached together at the same time. Ex. Vac Truck	<b>M</b>		
<b>13.</b>	Adjust for early/late hierarchically scheduled PM services.	<b>D</b>		

#### 6.4 Equipment Downtime/Availability Tracking

	Specification	M/D	Response	Comments
<i>The system should:</i>				
1.	Allow creation of a user defined downtime calendar for each piece of equipment. Options should include hours of service and available work days including or excluding weekends and holidays.	M		
2.	Store user defined downtime.	M		
3.	Track number of hours a work order is opened to calculate downtime for the piece of equipment.	M		
4.	Allow the administrator to define downtime statuses.	D		
5.	Provide ability to stop and re-start downtime.	D		
6.	Provide downtime analysis of work by total and averages of: <ul style="list-style-type: none"> <li>■ Equipment</li> <li>■ Class of equipment</li> <li>■ Work order number</li> <li>■ Department/division</li> </ul>	M		
7.	Report user downtime by cause.	D		
8.	Provide an online review of downtime by status.	D		
9.	Provide the ability to track downtime on multiple work orders opened on the same piece of equipment.	M		

## 6.5 Inventory Management

	Specification	M/D	Response	Comments
	<i>The system should:</i>			
1.	Maintain all pertinent data on each part in inventory including: <b>Part Number unique</b> to one part. <b>Part Name</b> <b>Part Description</b> <b>In Stock Quantity</b> <b>Item Cost</b> <b>Capitalized Cost</b> <b>Issue</b> <b>Last Issue to Work Order</b> <b>Part Category or classification</b> <b>Part Type or distinct usage</b> <b>Part Status</b> <b>% Mark Up for the individual part</b> <b>Location</b> <b>Alternate Location</b> <b>Vendor</b> <b>Substitute Part(s)</b> <b>Stock Quantities for max, low and safe.</b> <b>High Level</b> <b>Low Level</b> <b>Reorder Point</b> <b>Order Lead Time</b> <b>Mean Time Between Failure</b> <b>Auto Order</b> <b>Last Receipt</b> <ul style="list-style-type: none"> <li>■ Invoice</li> <li>■ Date Received</li> <li>■ Quantity</li> </ul> <b>Capitalized Cost</b>	M		
1.	Provide full audit tracking capabilities including the following adjustments by operator ID, date/time to:	M		

	<ul style="list-style-type: none"> <li>■ unit cost</li> <li>■ count</li> <li>■ return to inventory</li> <li>■ return to vendor</li> <li>■ deleted orders</li> <li>■ deleted receipts</li> <li>■ transfers from one storeroom to another</li> </ul>			
2.	Track purchases by: <b>Vendor</b> <b>Vendor Invoice Date</b> <b>Receiver</b> <b>Work Order Number</b>	<b>D</b>		
3.	Provide the capability to track notes related to parts with subject lines for easy searching.	<b>M</b>		
4.	Comprehensive parts tracking including recording all parts, ordering, receiving, returning and transferring.	<b>M</b>		
5.	System uses perpetual inventory methodology which allows you to look at a snapshot of your inventory for any given date and time.	<b>M</b>		
6.	FIFO and averaging available for the pricing of individual parts.	<b>M</b>		
7.	Research part repair history and track trends by Part Issues, Notes, and Work Orders.	<b>M</b>		
8.	Snapshot at-a-glance information for the part instantly available such as in-stock, return bins, available, on-order,	<b>M</b>		

	pricing, markup, last issue and last receipt, and activity over the last 12 months			
9.	Ability to cross-reference different vendor numbers for a given part or find acceptable substitutes for a given part	<b>M</b>		
10.	Specify unit of order, unit of issue, unit multiplier, markup and tax exemption individually per part	<b>M</b>		
11.	Provide the capability to order, receive and issue a part on a work order from a single screen.	<b>D</b>		
12.	Comprehensive searching capability to allow fast onscreen viewing of data, including: <ul style="list-style-type: none"> <li>■ <b>Vendor</b></li> <li>■ <b>Part Number</b></li> <li>■ <b>Part Name</b></li> <li>■ <b>Part Description</b></li> <li>■ <b>Part Category</b></li> <li>■ <b>Part Type</b></li> <li>■ <b>Default Vendor</b></li> <li>■ <b>Part Notes</b></li> <li>■ <b>Part Usage</b></li> <li>■ <b>Part Status</b></li> </ul>	<b>M</b>		
13.	Provide the ability to search for: <ul style="list-style-type: none"> <li>A. All back orders</li> <li>B. Orders not received</li> <li>C. All orders received</li> </ul>	<b>M</b>		
14.	Track multiple part storerooms and carry a separate inventory in each storeroom for the same part numbers.	<b>M</b>		
15.	Provide an online screen display with the following information	<b>M</b>		

	<p>when searching for part numbers:</p> <ul style="list-style-type: none"> <li>■ Part Number</li> <li>■ Storeroom</li> <li>■ Description</li> <li>■ Location</li> <li>■ In-Stock Quantity</li> <li>■ Unit Cost</li> <li>■ Reorder, Safety and High Limits</li> </ul> <p>This should include the ability to go to the part record by selecting a part from the list.</p>			
16.	<p>Have the ability to print the online search display for part numbers in a user defined sort order and easily export results in Word, Excel and .CSV format.</p>	M		
17.	<p>Inherent in the software (without using special characters) is the ability to have wild card search on partial field information: partial description, partial part number, partial manufacturer number, etc.</p>	M		
18.	<p>Include the following information on the part record online, either by month or year:</p> <ul style="list-style-type: none"> <li>■ history of the part usage (issues, issues returned, received, received returned, transferred in, transferred out, adjusted up, adjusted down</li> <li>end of period</li> <li>quantity, costs: unit, tax, shipping, extended cost by the month or by year.</li> </ul>	M		

	<ul style="list-style-type: none"> <li>■ Capable of reporting year by fiscal or calendar year.</li> </ul>			
19.	Differentiate between a stocked or non-stocked part records and offer all part capabilities for both.	<b>M</b>		
20.	Track the issuance of all stocked and non-stocked parts to a specific piece of equipment.	<b>M</b>		
21.	Have the ability to change a part number and have that change be reflected for all historical data.	<b>M</b>		
22.	Have a part number function that merges part records into one number while still retaining historical data.	<b>D</b>		
23.	Have the ability to create an order for all parts at the reorder point with the option to modify it to include or exclude any part.	<b>M</b>		
24.	Provide an option to track warranty and receipt information for non-stocked parts issues.	<b>M</b>		
25.	Generate a surplus parts report tracking lack of activity for user defined periods of time.	<b>M</b>		
26.	Provide a works list to assist in inventory counts.	<b>M</b>		
27.	Have the ability to list all receipts by vendor for all parts, a category of parts or specific part numbers.	<b>M</b>		



28.	Have the ability to generate a parts reorder list by vendor, category, part number or storeroom.	<b>M</b>		
29.	Have the capability to issue and charge parts to an individual or department without having to charge it to a work order. All associated costs must be tracked through the billing report.	<b>D</b>		
30.	Have the ability to identify a mark-up percentage by part number.			
31.	Track all credits to vendors by PO#, invoice #, date, type, and description.	<b>M</b>		
32.	Automatically recalculate the total on the PO # when a credit is issued by vendor.	<b>M</b>		
33.	Track multiple inventory storerooms and produce an audit trail for transfers among the storerooms.	<b>D</b>		
34.	Support a cyclical inventory capability where every part is inventoried over a user defined time period through a defined number of cycles.	<b>M</b>		
35.	Have a parts list capability where lists are created, stored and printed for specific repairs on specific equipment number; year, make, model; or class.	<b>D</b>		
36.	Provide direct access to unlimited stored images	<b>M</b>		

	associated with each part, i.e., MSDS sheets.			
<b>37.</b>	System uses perpetual inventory methodology which allows you to look at a snapshot of your inventory for any given date and time.	<b>M</b>		
<b>38.</b>	Snapshot at-a-glance information for the part instantly available such as in-stock, return bins, available, on-order, pricing, markup, last issue and last receipt, and activity over the last 12 months.	<b>M</b>		
<b>39.</b>	Core part tracking	<b>M</b>		

### 6.5.1 Barcoding

	Specification	M/D	Response	Comments
<i>The system should:</i>				
1.	Support the use of barcoding.	M		
2.	Ability to print bar code bin labels	M		
3.	Ability to Inventory by barcode with handheld Scanner.	M		

## 6.6 Maintenance Management

### 6.6.1 Work Order Management

	Specification	M/D	Response	Comments
<i>The system should:</i>				
1.	Provide a simple work order add from one screen. Please describe in detail each step of this process.	M		
2.	Provide default information upon adding a work order that displays the following equipment information: Fleet Number, Organization, Status, Year, Make, Model, GVW, Drive Train, License, State, Serial Number, Body Serial Number, Chassis Serial Number, Location, Monitor Group, Color, Asset Shop, Site, Class, Zip Code, Department, Priority, Availability, Book Value, Maintenance LTD, Last Work Order, Last Work Order Status, Last PMs, Last Meter(s), Identification Picture of equipment, Usage Code and Comments field.	M		
3.	Capture PM services, other	M		

	repairs, sublets and miscellaneous costs/credits on a single work order.			
<b>4.</b>	Capture multiple repair codes on a work order (such as the inclusion of a warranty repair on a PM work order) and provide for detailed analysis by repair code.	<b>M</b>		
<b>5.</b>	Isolate all work of a specific type by a defined period and restrict the analysis to any department and/or class of equipment.	<b>D</b>		
<b>6.</b>	Display all active warranties and PM due messages for the equipment and associated component(s) when the work order is opened.	<b>M</b>		
<b>8.</b>	<p>Search for a work order by each (or a combination) of the following:</p> <ul style="list-style-type: none"> <li>• Equipment number</li> <li>• Fixed Asset number</li> <li>• Class of vehicle</li> <li>• Work order number</li> <li>• Technician identification</li> <li>• Date In</li> <li>• Date out</li> <li>• Date Promised</li> <li>• Shop</li> </ul>	<b>M</b>		

	<ul style="list-style-type: none"> <li>• Status of the work order</li> <li>• Department</li> <li>• Document Symptom</li> <li>• Fuel Number</li> <li>• Notes</li> <li>• Priority</li> <li>• Repair Component</li> <li>• Repair Group</li> <li>• Repair Reason</li> <li>• Sublet Invoice</li> <li>• Sublet Vendor</li> <li>• Include Closed Work Order Option</li> <li>• Exact Match Option</li> </ul>			
<b>9.</b>	Provide the ability for inherent wild card (partial information) searches.	<b>M</b>		
<b>10.</b>	Provide the ability to add notes in HTML format capability and print them separately or with the work order.	<b>M</b>		
<b>11.</b>	Provide the ability to add additionally required repairs to complete the work order.	<b>M</b>		
<b>12.</b>	Alert the user when a repair is covered under a warranty.	<b>M</b>		
<b>13.</b>	Alert technicians upon sign on that assigned repairs are pending.	<b>D</b>		
<b>14.</b>	Require a specific authorization for closing a work order.	<b>M</b>		

<b>15.</b>	Require specific authorization for reopening a closed work order.	<b>M</b>		
<b>16.</b>	Provide an online summary review screen of all costs associated with each work order.	<b>D</b>		
<b>17.</b>	Allow addition of user defined costs to the work order including description and mark ups.	<b>M</b>		
<b>18.</b>	Allow credits to the work order.	<b>M</b>		
<b>19.</b>	Directly produce existing parts and tasks lists associated with any repair. These lists may be printed or reviewed online.	<b>M</b>		
<b>20.</b>	Repairs cannot be closed with incomplete associated task checklists.	<b>M</b>		
<b>21.</b>	Provide for customer work order print including or excluding labor hours and/or notes.	<b>M</b>		
<b>22.</b>	Should automatically notify the customer via email when the equipment is ready for pick up.	<b>M</b>		
<b>23.</b>	Allow a work order to have a credit balance.	<b>M</b>		
<b>24.</b>	Provide direct access to	<b>M</b>		

	unlimited stored images associated with the work order.			
<b>25.</b>	Must have the ability to store images associated to work orders in the database or on a network share.	<b>M</b>		
<b>26.</b>	Ability to capture maintenance information for accounting and billing.	<b>M</b>		
<b>27.</b>	Provide robust search capability that includes the ability to change column sequence and remove columns as needed as well as sorting ability to create ad-hoc reports	<b>M</b>		
<b>28.</b>	Provide capability for customers to view work orders on-line and in a report that shows promised due date and send out an alert to VFS and Customer when order misses due date.	<b>M</b>		



### 6.6.2 Shop Management and Planning

	Specification	M/D	Response	Comments
<i>The system should:</i>				
1.	Allow determination of cause, repair, work order and vehicle for any defined period on all parts issued.	M		
2.	Record all commercial or sublet repairs to enable analysis by cause and repair code.	M		
3.	Link a repair to an operator/driver/employee so driver abuse and accidents are identified and/or billed back.	M		
4.	Provide the capability to view all work orders online in real time by status.	D		
5.	Provide a real time single screen review of the direct/indirect labor activities for all logged on technicians.	M		
6.	Review online all work order detail information for quality control when a work order is closed.	M		
7.	Provide the ability to defer repairs and automatically include them on the next opened work order for that piece of equipment.	M		
8.	Provide the ability to assign deferred repairs to a specific technician and/or shop.	M		
10.	Ability to track service process procedures to a specific repair for a specific piece of equipment.	M		
11.	Create Department Work Order or Direct Charge	M		

	documents to capture billing that relates to a cost center of an asset.			
<b>12.</b>	Ability to charge labor hours using Flat Rate labor charges	<b>M</b>		
<b>13.</b>	Ability for the shop manager to perform mass logoff of technicians in all shops	<b>M</b>		
<b>14.</b>	Recall campaign management	<b>M</b>		
<b>15.</b>	Ability to record notes on technicians by Supervisor regarding a specific order that can only be accessed and viewed by the Supervisor and will not appear on the Work Order.	<b>D</b>		
<b>16.</b>	Labor planning Calendar displaying scheduled tasks, scheduled indirect labor, online request and certificates in a convenient calendar view	<b>M</b>		
<b>17.</b>	Show an audit history on-line and report by technician and Work Order that shows anytime time was adjusted on a work order.	<b>M</b>		
<b>18.</b>	Capability to notify technicians on the floor of their parts status that they have ordered and when they arrive.	<b>M</b>		

### 6.6.3 Technician Workstation

	Specification	M/D	Response	Comments
<i>The system should:</i>				
1.	Automatically display a technician specific screen listing any deferred repairs upon opening any work order.	M		
2.	Provide the ability for the technician to add work order notes from the technician workstation screen.	M		
3.	Provide a workstation on the shop floor so technicians can sign on/off to work orders as they begin and complete each repair.	M		
4.	Technician Workstations must have monitor touch pad availability	D		
5.	Provide the ability to add notes in HTML format capability directly to the work order.	M		
6.	Provide the ability to print work orders including notes	M		
7.	Create Department Work Order or Direct Charge documents to capture billing that relates to a cost center of an asset	D		

8.	Capture and assign pending repairs for multiple assets	M		
9.	Ability to view work in progress for direct, indirect labor, and technicians waiting on job assignment	M		
10.	Track and manage all technician time, including non-billable labor hours	M		
11.	Real-time repair tracking.	M		
12.	Tracking of staff training and certifications	M		
13.	Provide the ability to search for specific work orders and work previously performed on a piece of equipment.	M		
14.	Provide searches for specific repairs and/or timeframes on a piece of equipment by: <b>The Technician</b> <b>Repairs in Default Shop</b> <b>All Repairs in Default Shop</b> <b>All Repairs in All Shops</b> <b>Search by Asset Number</b> <b>Search by License Number</b> <b>Search by VIN Number</b>	M		

<p><b>15.</b></p>	<p>Have a quick assist functionality so that technicians can quickly and easily click off current job and click onto another to assist on jobs as needed and the time is accurately tracked in real-time.</p>	<p><b>M</b></p>		
<p><b>16.</b></p>	<p>Have the ability for technicians to electronically request parts directly to the parts room.</p>	<p><b>M</b></p>		

#### 6.6.4 Customer Service

	Specification	M/D	Response	Comments
<i>The system should:</i>				
1.	Customer portal and automatic notifications to assist your customers	M		
2.	Ability for customers to request repairs for equipment online as well as repair history from any computer using web browser	M		
3.	Automatically notify customers via email when the equipment is ready for pick up	M		
4.	Ability to view the user's upcoming maintenance.	M		
5.	Ability for users to enter meter readings for the asset.	M		

## 6.7 Fuel Management

	Specification	M/D	Response	Comments
<i>The system should:</i>				
1.	Have the capability to track all fueling purchased in-house and commercially.	M		
2.	Provide the ability to track fuel by an individual or piece of equipment.	M		
3.	Have the ability to view online fuel and operational fluids costs transactions and the accompanying meter reading.	M		
4.	Provide search capabilities for fuel transactions by site, user-selected date range or equipment number.	M		
5.	Interface with multiple onsite automated fuel systems Grayco or commercial card programs.	M		
6.	Provide the ability to manually enter fuel transactions.	M		
7.	Ability to review and edit fuel exceptions prior to posting in software system	M		
8.	Web-services capability that provide Fuel Vendors the ability to integrate	M		

	with fleet software in real-time			
<b>9.</b>	Track multiple alternate fuels.	<b>M</b>		
<b>10.</b>	Ability to edit fuel transactions before posting in FMIS system.	<b>M</b>		



## 6.8 Business Intelligence

### 6.8.1 Standard Reports

	Specification	M/D	Response	Comments
<i>The system should:</i>				
1.	Support a standard ad hoc report writer. Please provide the name of the recommended report writer.	M		
2.	Provide standard reports based on fleet and business best practice that provide multiple sort and selection criteria along with drill down capabilities.	M		
3.	Comprehensive searching capability for fast onscreen viewing of data throughout the system	M		
4.	Ability to quickly export search results data to Microsoft Excel	M		
5.	Provide in-product access to MS Report Builder for custom reporting capabilities.	M		
6.	Native web deployment of reports	M		
7.	In-line access to data dictionary that provides information on key areas of the database such as tables, schemas, columns, stored procedures.	M		
8.	Ability to schedule Automated customizable reports.	M		

9.	<i>Reports to be included (but not limited to):</i>	<b>D</b>		
	<p><b><u>Asset Management Scheduled Maintenance Due Report</u></b>  Comprehensive list of all PMs' due within a specified date range and variable percentage of meter or fuel consumption.</p>			
	<p><b><u>Average Age-Cost per Meter Comparison Report</u></b>  Calculates the average age, in years, of all vehicles in the class within a given range of years. Also provides the average cost per meter (CPM) for all vehicles in the class for each year within the year range.</p>			
	<p><b><u>Asset Replacement Report</u></b>  Identify assets in need of replacement and project costs. Ability to choose whether or not to show an asset's children.</p>			
	<p><b><u>Asset Utilization Report</u></b>  Miles driven within a timeframe by equipment, class, and/or department.</p>			
	<p><b><u>Asset Master List</u></b>  Includes year, make, model, department, and acquired date with ability to sort by license number, serial number.</p>			

	<p><b><u>PM Completion Information</u></b>  A listing of PM completion information for PMs due during the specified date range and the specified variances.</p>			
	<p><b><u>Asset Inventory Snapshot Report</u></b>  Displays asset inventory levels. Provides asset inventory levels from a specific closeout.</p>			
	<p><b><u>Equipment History Report</u></b>  Detailed history of equipment costs by month and year, including all costs broken out by accident; maintenance and repair; fuel and other fluid quantities; miles per gallon and cost per mile calculations.</p>			
	<p><b><u>Inventory Management Parts Inventory Report</u></b>  Summary of parts inventory movement by storeroom including category, location or type and/or mark up.</p>			

	<p><b><u>Parts Issued Report</u></b>  Parts issued within a timeframe, quantity issued and cost with ability to sort by storeroom, work order or repair reason including:</p> <ul style="list-style-type: none"> <li>■ Work Order or Independent Issue Document Number</li> <li>■ Equipment Number</li> <li>■ Part Storeroom</li> <li>■ Part Number</li> <li>■ Part Description</li> <li>■ Full Repair Type</li> <li>■ Part Issue Operator ID</li> <li>■ Date</li> <li>■ Qty Issued</li> <li>■ True Cost</li> <li>■ Total Cost</li> </ul>			
	<p><b><u>Parts Received Report</u></b>  Parts received by vendor for a timeframe with ability to sort by vendor, purchase order number or storeroom.</p>			
	<p><b><u>Part Orders Not Received Report</u></b>  Part orders not received or on backorder with the ability to sort by part number, storeroom or vendor.</p>			
	<p><b><u>Parts Order Recommendation Report</u></b>  Vendor list displaying parts with quantities less than or equal to the reorder level and not already on order. This should include the recommended order quantity.</p>			

<p><b><u>Parts Transfer Report</u></b> List all parts transferred between storerooms or returned to a vendor.</p>			
<p><b><u>Vendor Returns Report</u></b> A detailed list of all parts returned to their vendors.</p>			
<p><b><u>Inventory Count Sheet in Location Order</u></b> Count sheets of part numbers in storeroom then location order.</p>			
<p><b><u>Direct Charge Transactions Report</u></b> A listing of direct charge transaction details within a specified date range. It displays part issues, part returns as separate records, and other costs.</p>			
<p><b><u>Parts Obsolescence</u></b> Parts not issued, ordered, received, or transferred since a specified time.</p>			
<p><b><u>Parts Inventory Movement Report</u></b> List of parts with any physical movement including receipts; return receipts; transfers in/out; issues; and issues returned. Totals include the last month, 3 months, 6 months, and 12 months.</p>			
<p><b><u>Inventory Discrepancy Report</u></b> Parts adjusted during an inventory displaying details and discrepancy percentage of distinct</p>			

<p>parts, quantity in stock and dollar value.</p>			
<p><b><u>Valuation of Perpetual Inventory</u></b>          Displays the parts inventory for the end of the day on any specified date.</p>			
<p><b><i>WORK ORDER Management</i></b>  <b><u>Work Order details by Date Report</u></b>          Detailed printout of all work order information including but not limited to:</p> <ul style="list-style-type: none"> <li>■ Equipment/Asset Information</li> <li>■ Technician Repairs Performed with Costs.</li> <li>■ Sublet Repairs Performed with Costs.</li> <li>■ Parts Issued with Costs.</li> <li>■ Credits and Miscellaneous Costs.</li> <li>■ Subtotals/Totals.</li> <li>■ Notes.</li> </ul>			
<p><b><u>Technicians Accountability</u></b>          Provide totals by technician and shop for direct, indirect and total labor hours, costs, number of vehicles and work orders. It should provide a chart depicting direct vs. indirect labor hours by repair descriptions.</p>			

	<p><b><u>Work Order Sublet by Vendor</u></b> Provides a list of outside work performed with labor hours and cost totals for each vendor.</p>			
	<p><b><u>Work Order Dollar Summary Report</u></b> Displays the summary of dollars accrued on work orders. Displays the work order dollars for labor, non-stock parts, stock parts, sublets, and other costs.</p>			
	<p><b><u>Fleet Work Order Activity</u></b> Displays a summary of basic work order information including total dollars. This reports displays the total hours open and total dollars for each work order with a summary count of work orders for each repair type reason.</p>			
	<p><b><u>Down Time Details Report</u></b> Displays detailed downtime records by various sort options.</p>			
	<p><b><u>Active Work Orders</u></b> Provide a report listing all open work orders for a specific shop including:</p> <ul style="list-style-type: none"> <li>■ equipment number</li> <li>■ date in</li> <li>■ number of days open</li> </ul>			

	<ul style="list-style-type: none"> <li>■ status</li> <li>■ shop</li> <li>■ mechanic</li> <li>■ initiating repair</li> </ul>			
	<p><b><u>Possible Comeback Report</u></b>  Provide a report displaying equipment with possible comeback repairs. A possible comeback is defined as the same type of repair done on the same equipment within a specified number of days.</p>			
	<p><b><u>PM Labor Percentage Report</u></b>  Report that compares the labor for a given date range showing the ratio of PMs to Non-PMs (excluding accident and capitalization repairs).</p>			
	<p><b><u>Average Repair Time and Cost</u></b>  Provide a report to establish labor standards for repairs by showing the average hours to complete the repair on past work orders.</p>			
	<p><b><u>Work Order Audit Reports</u></b>  Provide reports to show an audit trail of changes and deletions to work orders.</p>			



	<p><b><u>Scheduled vs. Nonscheduled Repairs</u></b>  Provide a snapshot chart displaying the number of scheduled versus unscheduled repairs by month for the past 12 months.</p>			
	<p><b><u>Repair Reason Frequency</u></b>  Displays a summary of distribution of repairs for various repair type reasons. A line chart showing the number of repairs for each reason code by month for the 365 days prior to the date the report is run.</p>			
	<p><b><u>Technician Productivity Percentage Report</u></b>  This is a fleet performance measure report comparing the technicians' paid time to their production time.</p>			
	<p><b><u>Fleet Availability Report</u></b>  Provide a summary report showing the percentage of time vehicles are available to users during a specified time period sorted by:</p> <ul style="list-style-type: none"> <li>■ department</li> <li>■ class</li> <li>■ work order shop</li> <li>■ equipment availability code</li> <li>■ special monitor group</li> </ul>			
	<p><b><u>Technician Labor Activity Report</u></b></p>			

	<p>A productivity percentage report comparing paid dollars vs. earned dollars for each technician showing cost to labor dollars percentage.</p>			
	<p><b><u>Fleet Activity Report</u></b>  This report provides a summary of fleet activity. This report should consist of four sections: Work order count summaries by maintenance shop, PM count summaries by PM type, Fuel summaries by fuel type, and Parts received and issued summaries by storeroom for a date range specified.</p>			
	<p><b><u>FUEL Management Fuel Transaction Report</u></b>  Displays fuel transaction details for a specified date range. Displays all fuel transaction details, including costs and meter information.</p>			
	<p><b><u>Non-Fueled Assets</u></b>  Displays a list of vehicles not fueled in a specified date range.</p>			
	<p><b><u>Fuel Usage detail Report</u></b>  Displays fuel gallons and dollars plus meter usage for the specified date range, along with meter per gallon cost per meter.</p>			

	<p><b><i>BILLING</i></b>  <b><u>Billing by Department</u></b>  Provide a billing report sorted by department. Displays a list of vehicles and operational/fuel costs, as well as fixed base, replacement, other and insurance charges for the billing period.</p>			
	<p><b><i>Billing With Accounts</i></b>  Provide a billing report sorted by department and account number. Displays a list of vehicles and operational costs including: Fuel, Labor, Parts, Sublet, Motor Pool, and Administration costs, as well as fixed base, replacement, other and insurance charges for the billing period with account summary.</p>			
	<p><b><u>Billing By Department History Report</u></b>  Provide a billing report for a past billing period. Displays a list of vehicle repairs and operational/fuel costs, as well as fixed base, replacement, other, and insurance charges by batch number from history tables.</p>			

### 6.8.2 Dashboard

	Specification	M/D	Response	Comments
<i>The vendor should:</i>				
1.	Dashboard, providing easily accessible at-a-glance overview of the key performance indicators of your fleet	M		
2.	Please list and describe all the standard KPI's (Key Performance Indicators) that are part of the Dashboard	M		
3.	Dashboard must be real-time	M		
4.	Views must be role based so that different users can view different KPI's that are important to their role.	M		
5.	Capability of multi-level drill down to key items to view the related record	M		
6.	Ability for each user to customize and save their view	M		
7.	The KPI's should have the capability to be configured by the user with configurable thresholds	M		

## 6.9 Training

	Specification	M/D	Response	Comments
<i>The vendor should:</i>				
1.	Provide a combination of onsite and remote system training for transitioning to live production with the software. The proposed pricing should include all recommended training.	M		
2.	Provide training for all levels of users from management to shop floor technicians.	M		
3.	Provide an annual user conference for additional educational opportunities	M		
4.	Opportunity for customized regional training	D		
5.	On-site go-live training	M		

### 6.10 Customer Support

	Specification	M/D	Response	Comments
<i>The vendor should:</i>				
1.	Provide support services through an unlimited 800 line from 7:30 am to 6:00 pm EST, Monday through Friday. After hours support staff should be available.	M		
2.	Provide remote diagnostic support and include as part of annual support in the service agreement.	M		
3.	Toll free 24x7 support year round	D		
4.	All enhancements included in annual support fee	M		
5.	Guaranteed maximum two (2) hour response time to all electronic requests for support or service	M		
6.	Support calls are answered by full time support technicians that are experts in the software	M		
7.	On staff full time fleet professionals with experience in the municipal fleet industry	M		

## 6.11 Internet Technology

	Specification	M/D	Response	Comments
<i>The system should:</i>				
1.	<p>Include a customer portal piece that is an individual application in the core product used to provide paperless/electronic communication between the fleet and outside customers. Some of the features consist of:</p> <ul style="list-style-type: none"> <li>■ Automatic work order status notification to assist the customers.</li> <li>■ Automatically notify customers via email when equipment is ready for pick up.</li> <li>■ Generates an automatic email notification in advance whenever PM is due on an asset, upcoming vehicle expiration, scheduled appointment confirmation, etc.</li> <li>■ User has the ability to electronically request service.</li> <li>■ Ability to look up repair history on the asset.</li> </ul>	<b>D</b>		

<b>2.</b>	Provide access to standard and customizable reports available using a browser and IP address through a centralized web report server. Access should be unlimited and controlled by our organization's Web Master.	<b>M</b>		
<b>3.</b>	Maintain open and standard software protocol that is consistent and supportive of future Microsoft development and the growth of internet technologies.	<b>M</b>		
<b>4.</b>	Browser-based client	<b>M</b>		
<b>5.</b>	A browser interface design that incorporates the entire user experience.	<b>M</b>		
<b>6.</b>	Ability to store linked attachments (graphics) in the database or on a network share.	<b>M</b>		



## 7 VENDOR INFORMATION

The following vendor information shall be provided in the proposal.

### 7.1 Vendor Overview

#### B. Contact Information

<b>Company Name</b>	
<b>Address</b>	
<b>Telephone Number</b>	
<b>Name of Contact Person</b>	
<b>E-mail Address</b>	
<b>Name of Person with binding authority to enter into contracts</b>	

- C. Describe your company's purpose, mission and values and explain how they will support the relationship with this organization's fleet management objectives.
- D. Provide a history of your company and the proposed software.
- E. Describe your customer base.
- F. Describe general characteristics that differentiate your company from others in the industry. Include any special advantages your services and system provides. Describe how they support decision making, streamlining tasks, error reduction to support more productive fleet personnel.
- G. Describe deployment options available.
- H. References:
  - a) Provide a list of three (3) sites similar to our organization where software and services are currently utilized. Include contact information:

### 7.2 Features of Product and Services

#### 7.2.1 Project Overview

- A. Describe the fundamental design of the software application to include the database structure, connectivity and the method of data entry/user interface.
- B. Describe the proposed system architecture and the language in which it is written to include installation deployment options.
- C. Please describe the ownership of your company.

### **7.2.2 Project Management**

- A. Describe your implementation services, with emphasis on planning, conversion and process change management.
- B. Provide a sample project timeline of tasks and deliverables including areas of responsibilities (i.e. vendor vs. organization).

### **7.2.3 Documentation**

- A. Describe the types of documentation your company provides with the system. Detail the forms and how they are updated and distributed. Specify which documentations and updates are included as a part of support services.

### **7.2.4 Support Services**

- A. Describe your technical support services available and costs associated with them. If there are different levels of support services, please describe the levels and list the services included. At a minimum support should include:
  - Electronic Requests for Support (email and/or web)
  - 800-line services (list hours)
  - Remote Diagnostics
  - Training/Educational Opportunities
  - Upgrades/Enhancements

### **7.2.5 System Administration**

- A. Describe System Administration to include setup and maintenance, Reports administration, and Disaster Recovery and Backup.

**APPENDIX I  
Proposal Cost Form**

Awarded Contractor shall perform the services to be performed as set forth in this RFP and more particularly described in Section 5 for a not to exceed total amount of

\$ \_\_\_\_\_.

Proposer shall attach proposal cost breakdown to Appendix I – Proposal Cost Form.

\_\_\_\_\_

Firm Name:

\_\_\_\_\_

Authorized Signature \_\_\_\_\_ Date \_\_\_\_\_

Signed by: \_\_\_\_\_  
[Type or Print Name]

Title of Signer: \_\_\_\_\_

## APPENDIX II

### PROPOSER QUESTIONNAIRE

The following questions must be answered, and data given must be clear and comprehensive. If necessary, questions may be answered on separate sheets. The Proposer may submit any additional information desired.

Company Name:		d/b/a (if applicable)	
Street / PO Box:			
City:		State:	Zip:
Phone:	Fax:	E-Mail:	
Website (if applicable):			
<input type="checkbox"/> Sole Proprietor <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation <input type="checkbox"/> Other			
Number of years in business under company's present name:			
Fed Tax ID #:		DUNS #	
Are you certified with the North Carolina Secretary of State to conduct business (if required)? (Check One) YES: <input type="checkbox"/> NO: <input type="checkbox"/> Not Applicable: <input type="checkbox"/>			
Are you properly licensed/certified by the Federal and/or State of North Carolina to perform the specified work? YES: <input type="checkbox"/> NO: <input type="checkbox"/> Not Applicable: <input type="checkbox"/> ATTACH COPY OF ALL APPLICABLE LICENSING/CERTIFICATION DOCUMENTS Are/will you be properly insured to perform the work?    YES: <input type="checkbox"/> NO: <input type="checkbox"/>			
Contact for this Contract:		Title:	
Phone:	Fax:	E-Mail:	
Have you ever defaulted or failed on a contract? (If yes, attach details) YES: <input type="checkbox"/> NO: <input type="checkbox"/>			
List at least three (3) references for which you have provided these services (same scope/size) in the past three years - preferably government agencies. Do not include City of Raleigh as a reference to meet the requirement of listing at least (3) references. <b>PROPOSERS ARE RESPONSIBLE FOR SENDING REFERENCE QUESTIONNAIRE (APPENDIX III) TO THEIR REFERENCES.</b>			
1.	Company:		
	Contact Person:		Title:
	Phone:	Fax:	E-Mail:
Describe Scope of Work:			
2.	Company:		
	Contact Person:		Title:
	Phone:	Fax:	E-Mail:
Describe Scope of Work:			
3.	Company:		
	Contact Person:		Title:
	Phone:	Fax:	E-Mail:
Describe Scope of Work:			
4.	Company:		
	Contact Person:		Title:
	Phone:	Fax:	E-Mail:
Describe Scope of Work:			
5.	Company:		
	Contact Person:		Title:
	Phone:	Fax:	E-Mail:
Describe Scope of Work:			
The undersigned swears to the truth and accuracy of all statements and answers contained herein:			
Authorized Signature:		Date:	

## **APPENDIX III**

### **City of Raleigh**

## **Vehicle Fleet Information Software System**

### **Reference Questionnaire**

The City of Raleigh, as a part of the RFP, requires proposing companies to submit a minimum of three (3) business references as required within this document. The purpose of these references is to document the experience relevant to the scope of services and provide assistance in the evaluation process.

The Proposer is required to send the reference form (the following two pages) to each business reference listed on Proposer Questionnaire. The business reference, in turn, is requested to submit the Reference Form directly to the City of Raleigh Point of Contact identified on the Reference Questionnaire form for inclusion in the evaluation process. The form and information provided will become a part of the submitted proposal. The business reference may be contacted for validation of the response. It is the Proposer's responsibility to verify their references have been received by the City of Raleigh Point of Contact by the date indicated on the reference form.

City of Raleigh

# 001 – Vehicle Fleet Service 2019 – 1 Vehicle Fleet Information Software System)

REFERENCE QUESTIONNAIRE

(Name of Business Requesting Reference)

This form is being submitted to your company for completion as a business reference for the company listed above.

This form is to be returned to the City of Raleigh, Travis Brown, via email to [travis.brown@raleighnc.gov](mailto:travis.brown@raleighnc.gov) no later than 3:30 **p.m. ET, October 4 2019** and **MUST NOT** be returned to the company requesting the reference.

For questions or concerns regarding this form, please contact the City of Raleigh, Point of Contact above.

**Company Providing Reference**

**Contact Name and Title/Position**

**Contact Telephone Number**

**Contact Email Address**

Questions:

1. In what capacity have you worked with this company in the past? If the company was under a contract, please acknowledge and explain briefly whether or not the contract was successful.

Comments:

2. How would you rate this company's knowledge and expertise?

3= Excellent

2= Satisfactory

1= Unsatisfactory

0= Unacceptable

Comments:

3. How would you rate the company's flexibility relative to changes in the scope and timelines?

3= Excellent

2= Satisfactory

1= Unsatisfactory

0= Unacceptable

Comments:

4. What is your level of satisfaction with hard-copy materials, e.g. reports, logs, etc. produced by the company?

3= Excellent

2= Satisfactory

1= Unsatisfactory

0= Unacceptable

Comments:

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5. How would you rate the dynamics/interaction between the company and your staff?  
 3= Excellent     2= Satisfactory     1= Unsatisfactory     0= Unacceptable

Comments:

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6. Who were the company's principle representatives involved in providing your service and how would you rate them individually? Would you comment on the skills, knowledge, behaviors or other factors on which you based the rating?  
(3= Excellent; 2= Satisfactory; 1= Unsatisfactory; 0= Unacceptable)

Name:	_____	Rating:	_____
Name:	_____	Rating:	_____
Name:	_____	Rating:	_____
Name:	_____	Rating:	_____

Comments:

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7. With which aspect(s) of this company's services are you most satisfied?

Comments:

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8. With which aspect(s) of this company's services are you least satisfied?

Comments:

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9. Would you recommend this company's services to your organization again?

Comments:

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## APPENDIX IV

### CONTRACT STANDARD TERMS AND CONDITIONS

The contract terms provided herein shall become a part of any contract issued as a result of this solicitation. Any exceptions to the contract terms must be stated in the submittal. Any submission of a proposal without objection to the contract terms indicates understanding and intention to comply with the contract terms. If there is a term or condition that the firm intends to negotiate, it must be stated in the proposal. The successful firm will not be entitled to any changes or modifications unless they were first stated in the proposal. The City of Raleigh reserves the right, at its sole discretion, to reject any or all submittal package(s) containing unreasonable objections to standard City of Raleigh contract provisions.

1. Compensation; Time of Payment

The standard City of Raleigh payment term is NET 30 days from the date of invoice. For prompt payment all invoices should be emailed to ([accountspayable@raleighnc.gov](mailto:accountspayable@raleighnc.gov)) or mail to the City of Raleigh, Accounts Payable, PO Box 590, Raleigh, North Carolina 27602-0590. All invoices must include the Purchase Order Number. Invoices submitted without the correct purchase order number will result in delayed payment.

2. Workmanship and Quality of Services

All work performed under this Contract shall be performed in a workmanlike and professional manner, to the reasonable satisfaction of the City, and shall conform to all prevailing industry and professional standards.

3. Non-discrimination

To the extent permitted by North Carolina law, the parties hereto for themselves, their agents, officials, employees and servants agree not to discriminate in any manner on the basis of race, color, creed, national origin, sex, age, handicap, or sexual orientation with reference to the subject matter of this Contract. The parties further agree, to the extent permitted by law, to conform with the provisions and intent of City of Raleigh Ordinance 1969-889, as amended. This provision is hereby incorporated into this Contract for the benefit of the City of Raleigh and its residents, and may be enforced by action for specific performance, injunctive relief, or other remedy as provided by law. This provision shall be binding on the successors and assigns of the parties with reference to the subject matter of this Contract.

4. Minority or Women Owned Business Enterprise

The City of Raleigh prohibits discrimination in any manner on the basis of race, color, creed, national origin, sex, age or handicap or sexual orientation and will pursue an affirmative policy of fostering, promoting and conducting business with women and minority owned business enterprises. The City of Raleigh encourages participation by certified minority and women-owned businesses. If there are any questions, Contact the MWBE Program Manager, PO BOX 590 Raleigh, NC 27602, [mwbe@raleighnc.gov](mailto:mwbe@raleighnc.gov), or 919-996-4330.



5. Assignment

This Contract may not be assigned without the express written consent of the City.

6. Applicable Law

All matters relating to this Contract shall be governed by the laws of the State of North Carolina, without regard to its choice of law provisions, and venue for any action relating to this Contract shall be Wake County Civil Superior Court or the United States District Court for the Eastern District of North Carolina, Western Division.

7. Insurance

Contractor agrees to maintain, on a primary basis and at its sole expense, at all times during the life of this Contract the following coverages and limits. The requirements contained herein, as well as City's review or acceptance of insurance maintained by Contractor is not intended to and shall not in any manner limit or qualify the liabilities or obligations assumed by Contractor under this Contract.

**Commercial General Liability** – Combined single limit of no less than \$1,000,000 each occurrence and \$2,000,000 aggregate. Coverage shall not contain any endorsement(s) excluding nor limiting Product/Completed Operations, Contractual Liability or Cross Liability.

**Automobile Liability** – Limits of no less than \$1,000,000 Combined Single Limit. Coverage shall include liability for Owned, Non-Owned and Hired automobiles. In the event Contractor does not own automobiles, Contractor agrees to maintain coverage for Hired and Non-Owned Auto Liability, which may be satisfied by way of endorsement to the Commercial General Liability policy or separate Auto Liability policy. Automobile coverage is only necessary if vehicles are used in the provision of services under this Contract and/or are brought on a COR site.

**Worker's Compensation & Employers Liability** – Contractor agrees to maintain Worker's Compensation Insurance in accordance with North Carolina General Statute Chapter 97 with statutory limits and employees liability of no less than \$1,000,000 each accident.

**Additional Insured** – Contractor agrees to endorse the City as an Additional insured on the Commercial General Liability, Auto Liability and Umbrella Liability if being used to meet the standard of the General Liability and Automobile Liability. The Additional Insured shall read '**City of Raleigh is named additional insured as their interest may appear**'.

**Certificate of Insurance** – Contractor agrees to provide COR a Certificate of Insurance evidencing that all coverages, limits and endorsements required herein are maintained and in full force and effect, and Certificates of Insurance

shall provide a minimum thirty (30) day endeavor to notify, when available, by Contractor's insurer. If Contractor receives a non-renewal or cancellation notice from an insurance carrier affording coverage required herein, or receives notice that coverage no longer complies with the insurance requirements herein, Contractor agrees to notify the City within five (5) business days with a copy of the non-renewal or cancellation notice, or written specifics as to which coverage is no longer in compliance. **The Certificate Holder address should read:**

**City of Raleigh  
Post Office Box 590  
Raleigh, NC 27602-0590**

**Umbrella or Excess Liability** – Contractor may satisfy the minimum liability limits required above under an Umbrella or Excess Liability policy. There is no minimum Per Occurrence limit of liability under the Umbrella or Excess Liability, however, the Annual Aggregate limits shall not be less than the highest 'Each Occurrence' limit for required policies. Contractor agrees to endorse City of Raleigh as an 'Additional Insured' on the Umbrella or Excess Liability, unless the Certificate of Insurance states the Umbrella or Excess Liability provides coverage on a 'Follow-Form' basis.

**Professional Liability** – Limits of no less than \$1,000,000 each claim. This coverage is only necessary for professional services such as engineering, architecture or when otherwise required by the City.

All insurance companies must be authorized to do business in North Carolina and be acceptable to the City of Raleigh's Risk Manager.

8. Indemnity

Except to the extent caused by the sole negligence or willful misconduct of the City, the Contractor shall indemnify and hold and save the City, its officers, agents and employees, harmless from liability of any kind, including all claims, costs (including defense) and losses accruing or resulting to any other person, firm, or corporation furnishing or supplying work, services, materials, or supplies in connection with the performance of this Contract, and from any and all claims, costs (including defense) and losses accruing or resulting to any person, firm, or corporation that may be injured or damaged by the Contractor in the performance of this Contract. This representation and warranty shall survive the termination or expiration of this Contract.

The Contractor shall indemnify and hold and save the City, its officers, agents and employees, harmless from liability of any kind, including claims, costs (including defense) and expenses, on account of any copyrighted material, patented or unpatented invention, articles, device or appliance manufactured or used in the performance of this Contract.

9. Intellectual Property

Any information, data, instruments, documents, studies, reports or deliverables given to, exposed to, or prepared or assembled by the Contractor under this Contract shall be kept as confidential proprietary information of the City and not divulged or made available to any individual or organization without the prior written approval of the City. Such information, data, instruments, documents, studies, reports or deliverables will be the sole property of the City and not the Contractor.

All intellectual property, including, but not limited to, patentable inventions, patentable plans, copyrightable works, mask works, trademarks, service marks and trade secrets invented, developed, created or discovered in performance of this Contract shall be the property of the City.

Copyright in and to any copyrightable work, including, but not limited to, copy, art, negatives, photographs, designs, text, software, or documentation created as part of the Contractor's performance of this project shall vest in the City. Works of authorship and contributions to works of authorship created by the Contractor's performance of this project are hereby agreed to be 'works made for hire' within the meaning of 17 U.S.C. 201.

10. Force Majeure

Except as otherwise provided in any environmental laws, rules, regulations or ordinances applicable to the parties and the services performed under this Contract, neither party shall be deemed to be in default of its obligations hereunder if and so long as it is prevented from performing such obligations by an act of war, hostile foreign actions, nuclear explosion, earthquake, hurricane, tornado, or other catastrophic natural event or act of God. Either party to the Contract must take reasonable measures and implement reasonable protections when a weather event otherwise defined as a force majeure event is forecast to be eligible to be excused from the performance otherwise required under this Contract by this provision.

11. Advertising

The Contractor shall not use the existence of this Contract, or the name of the City of Raleigh, as part of any advertising without the prior written approval of the City.

12. Cancellation

The City may terminate this Contract at any time by providing thirty (30) days written notice to the Contractor. In addition, if Contractor shall fail to fulfill in timely and proper manner the obligations under this Contract for any reason, including the voluntary or involuntary declaration of bankruptcy, the City shall have the right to terminate this Contract by giving written notice to the Contractor and termination will be effective upon receipt. Contractor shall cease performance immediately upon receipt of such notice.

In the event of early termination, Contractor shall be entitled to receive just and equitable compensation for costs incurred prior to receipt of notice of termination and for the satisfactory work completed as of the date of termination and delivered to the City. Notwithstanding the foregoing, in no event will the total amount due to Contractor under this section exceed the total amount due Contractor under this Contract. The Contractor shall not be relieved of liability to the City for damages sustained by the City by virtue of any breach of this Contract, and the City may withhold any payment due to the Contractor for the purpose of setoff until such time as the City can determine the exact amount of damages due the City because of the breach.

Payment of compensation specified in this Contract, its continuation or any renewal thereof, is dependent upon and subject to the allocation or appropriation of funds to the City for the purpose set forth in this Contract.

13. Laws/Safety Standards

The Contractor shall comply with all laws, ordinances, codes, rules, regulations, safety standards and licensing requirements that are applicable to the conduct of its business, including those of Federal, State, and local agencies having jurisdiction and/or authority.

All manufactured items and/or fabricated assemblies subject to operation under pressure, operation by connection to an electric source, or operation involving a connection to a manufactured, natural, or LP gas source shall be constructed and approved in a manner acceptable to the appropriate state inspector which customarily requires the label or re-examination listing or identification marking of the appropriate safety standard organization, such as the American Society of Mechanical Electrical Engineers for pressure vessels; the Underwriters' Laboratories and/or National Electrical Manufacturers' Association for electrically operated assemblies; or the American Gas Association for gas operated assemblies, where such approvals of listings have been established for the type(s) of devices offered and furnished. Further, all items furnished by the Contractor shall meet all requirements of the Occupational Safety and Health Act (OSHA), and state and federal requirements relating to clean air and water pollution.

Contractor must comply with *North Carolina Occupational Safety and Health Standards for General Industry, 29CFR 1910*. In addition, Contractor shall comply with all applicable occupational health and safety and environmental rules and regulations.

Contractor shall effectively manage their safety and health responsibilities including:

A. Accident Prevention

Prevent injuries and illnesses to their employees and others on or near their job site. Contractor managers and supervisors shall ensure personnel safety by strict adherence to established safety rules and procedures.

B. Environmental Protection

Protect the environment on, near, and around their work site by compliance with all applicable environmental regulations.

C. Employee Education and Training

Provide education and training to all contractors employees before they are exposed to potential workplace or other hazards as required by specific OSHA Standards.

14. Applicability of North Carolina Public Records Law

Notwithstanding any other provisions of this Contract, this Contract and all materials submitted to the City by the Contractor are subject to the public records laws of the State of North Carolina and it is the responsibility of the Contractor to properly designate materials that may be protected from disclosure as trade secrets under North Carolina law as such and in the form required by law prior to the submission of such materials to the City. Contractor understands and agrees that the City may take any and all actions necessary to comply with federal, state, and local laws and/or judicial orders and such actions will not constitute a breach of the terms of this Contract. To the extent that any other provisions of this Contract conflict with this paragraph, the provisions of this section shall control.

15. Miscellaneous

The Contractor shall be responsible for the proper custody and care of any property furnished or purchased by the City for use in connection with the performance of this Contract, and will reimburse the City for the replacement value of its loss or damage.

The Contractor shall be considered to be an Independent Contractor and as such shall be wholly responsible for the work to be performed and for the supervision of its employees. Nothing herein is intended or will be construed to establish any agency, partnership, or joint venture. Contractor represents that it has, or will secure at its own expense, all personnel required in performing the services under this Contract. Such employees shall not be employees of or have any individual contractual relationship with the City.

This Contract may be amended only by written agreement of the parties executed by their authorized representatives.

16. Right to Audit and Access to Records

1. The City may conduct an audit of any services performed and fees paid subject to this Contract. The City, or its designee, may perform such an audit throughout the contract period and for three (3) years after termination thereof or longer if otherwise required by law.
2. The Contractor and its agents shall maintain all books, documents, papers, accounting records, contract records and such other evidence as may be

appropriate to substantiate costs incurred under this Contract. The City, or its designee, shall have the right to, including but not limited to: review and copy records; interview current and former employees; conduct such other investigation to verify compliance with contract terms; and conduct such other investigation to substantiate costs incurred by this Contract.

3. "Records" shall be defined as data of every kind and character, including but not limited to books, documents, papers, accounting records, contract documents, information, and materials that, in the City's sole discretion, relate to matters, rights, duties or obligations of this Contract.
4. Records and employees shall be available during normal business hours upon advanced written notice. Electronic mail shall constitute written notice for purposes of this section.
5. Contractor shall provide the City or its designee reasonable access to facilities and adequate and appropriate workspace for the conduct of audits.
6. The rights established under this section shall survive the termination of the Contract, and shall not be deleted, circumvented, limited, confined, or restricted by contract or any other section, clause, addendum, attachment, or the subsequent amendment of this Contract.
7. The Contractor shall reimburse the City for any overcharges identified by the audit within ninety (90) days of written notice of the City's findings.

17. E – Verify

Contractor shall comply with E-Verify, the federal E-Verify program operated by the United States Department of Homeland Security and other federal agencies, or any successor or equivalent program used to verify the work authorization of newly hired employees pursuant to federal law and as in accordance with N.C.G.S. §64-25 et seq. In addition, to the best of Contractor's knowledge, any subcontractor employed by Contractor as a part of this contract shall be in compliance with the requirements of E-Verify and N.C.G.S. §64-25 et seq.

18. Iran Divestment Act Certification

Contractor certifies that, as of the date listed below, it is not on the Final Divestment List as created by the State Treasurer pursuant to N.C.G.S. § 147-86.55, *et seq.* In compliance with the requirements of the Iran Divestment Act and N.C.G.S. § 147-86.59, Contractor shall not utilize in the performance of the contract any subcontractor that is identified on the Final Divestment List.

19. Companies Boycotting Israel Divestment Act Certification

Contractor certifies that it has not been designated by the North Carolina State Treasurer as a company engaged in the boycott of Israel pursuant to N.C.G.S. 147-86.81.

**[REMAINDER OF PAGE INTENTIONALLY LEFT BLANK]**

## APPENDIX V EXCEPTIONS TO RFP

**Check one:**  NO EXCEPTIONS, PROPOSER COMPLIES WITH ALL DOCUMENTS IN RFP.  EXCEPTIONS ARE LISTED BELOW:

#	RFP Page #, Section #, Appendix #	Exceptions [Describe nature of Exception]	Explain why this is an issue	Proposed Alternative	Indicate if exception is negotiable (N) or non-negotiable (NN)
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					

**FAILURE TO IDENTIFY ANY EXCEPTIONS WILL INDICATE ACCEPTANCE OF ALL TERMS AND CONDITIONS, AND REQUIREMENTS OF THE RFP AND ANY CORRESPONDING ADDENDUM ISSUED. THE CITY, AT ITS SOLE DISCRETION, MAY MODIFY OR REJECT ANY EXCEPTION OR PROPOSED CHANGE.**

Firm:	Authorized Signature	Title:
Printed Name of Signer	Date:	