



REQUEST FOR PROPOSALS

FLEET MANAGEMENT SOFTWARE

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1. INTRODUCTION

The Fayetteville Public Works Commission (hereafter referred to as PWC) is soliciting proposals for a comprehensive Fleet Management Software Solution. Vendors will be responsible for providing a turn-key solution, to include all software and licenses, implementation services, labor, and support necessary for data conversion/migration, integration to existing technology systems, setup, testing, deployment and training.

PWC anticipates awarding contract(s) by December 2020 with an expected start date no later than January 2021 for the selected Vendor(s).

2. BACKGROUND/FLEET OPERATIONS

PWC was created on March 4, 1905, through an act of the state legislature to manage, operate, and supervise the three utilities – electric, water, and sanitary sewer services and serves more than 112,000 customers. PWC operates as a public authority owned by the City of Fayetteville, and is governed by four Commissioners appointed by the Fayetteville City Council. More information can be found at <http://faypwc.com>.

The Fleet Management Department supports PWC operations departments by maintaining over 600 vehicles and equipment:

# of Assets	Description
194	Light duty vehicles (pickup trucks, cars, etc.)
81	Heavy duty vehicles (dump trucks, bucket trucks, etc.)
23	Recreation type vehicles (ATVs, Gators, etc.)
139	Non-motorized equipment (trailers, mower platforms, etc.)
182	Equipment (excavators, graders, generators, etc.)

The Fleet Management Department also provides all associated tasks necessary to maintain a full-service fleet operation which includes:

- Maintaining a parts department that stocks 2,000 line items on-site, including tires.
- Managing a comprehensive preventative maintenance program to keep all vehicles in safe working condition.
- Operating a full-service machine and welding shop with the capability to do on-site welding for water and electric operations.
- Dispatching vendor services for towing and heavy duty tire repairs/replacements.
- Coordinating repair efforts and parts orders with outside vendors as needed.
- Coordinating safety recalls and tracking all manufacturer warranties.
- Dispatching PWC service vehicles and staff to assist internal customers with field maintenance, roadside repairs, and fueling.
- Maintaining fueling facilities for PWC.
- Preparing management reports to document and track data related to Fleet statistics.
- Providing asset management through the entire vehicle/equipment life cycle, to include developing recommendations for acquisitions, coordinating procurement

processes, placing into service, conducting life cycle analysis, and managing the decommissioning process.

The Fleet Management Department has 33 staff members. On-site services are provided in one building, with eighteen (18) mechanic bays and four (4) fabrication/welding bays. At this time, non-Fleet staff can access the current Fleet Management software, but have limited views and no self-service capability. The proposed solution should allow for more visibility and self-service options to view each operating departments fleet, individual vehicle availability and service history.

3. TERMS AND CONDITIONS

3.1 This document provides general and specific information for use by Vendor(s) in submitting a proposal to supply the Public Works Commission with information technology goods and services as listed in this RFP in accordance with N.C.G.S. 1436.129.8. We will select a qualified Vendor with whom we will develop a mutually beneficial contractual relationship. Our decision to award will be based on our determination of the proposal that offers the best overall benefit to the PWC, taking into account pricing, maintenance and support, and any value-added services and other factors specified herein. PWC reserves the right to reject any or all proposals. Prior to award of contract, the recommended Vendor shall enter into a Service Agreement with PWC.

3.2 ACCURACY OF RFP AND RELATED DOCUMENTS

The PWC assumes no responsibility for conclusions or interpretations derived from technical and background information presented in the RFP, or otherwise distributed or made available during the procurement process. In addition, the PWC will not be bound by or be responsible for any explanation, interpretation or conclusions of this RFP or any documents provided by the PWC other than those given in writing by the PWC through the issuance of addenda. In no event may a Vendor rely on any oral statement by the PWC or its agents, advisors or consultants.

3.3 PWC RIGHTS AND OPTIONS

The PWC, at its sole discretion, reserves the following rights:

- A. To supplement, amend, substitute or otherwise modify the RFP at any time;
- B. To cancel this RFP with or without the substitution of another RFP;
- C. To reject any or all proposals produced in response to the RFP; to take any action affecting this RFP, this RFP process, or the Services or facilities subject to the RFP that would be in the best interests of the PWC;
- D. To issue additional requests for information, and/or;
- E. To require one or more Vendor(s) to supplement, clarify or provide additional information in order for the PWC to evaluate the responses submitted.

3.4 EXPENSE OF SUBMITTAL PREPARATION

The PWC accepts no liability for the cost and expenses incurred by the Vendor in response to this RFP, including preparing requests for clarification. Each Vendor that prepares a Response shall do so at its own expense and with the express understanding that they cannot make any claims whatsoever for reimbursement from the PWC for the costs and expenses associated with the Response.

3.5 TRADE SECRETS/CONFIDENTIALITY

Upon receipt at the PWC, your Response is considered a public record, except for material which qualifies as "Trade Secret" information under N.C.G.S. 66-152(3). Your Response will be reviewed by PWC staff and members of the general public who submit public records request.

THE RESPONDER IS REQUIRED TO IDENTIFY ALL CONTENT DESIGNATED AS A TRADE SECRET AS DEVINED PURSUANT TO N.C.G.S. 66-152(3) AND WHICH MEETS THE CRITERIA FOR CONFIDENTIALITY PURSUANT TO N.C.G.S. 132.1.2(1). ALL NOTED TRADE SECRETS MUST FOLLOW PROCEDURES NOTED BELOW AND REQUIRE ATTACHED DOCUMENTATION SPECIFYING HOW THE CONTRENT QUALIFIES AS A TRADE SECRET UNDER NORTH CAROLINA LAW. IF AN ENTIRE RESPONSE IS MARKED CONFIDENTIAL OR TRADE SECRET, IT WILL BE DISQUALIFIED FROM CONSIDERATION.

To properly designate material as "trade secret" under these circumstances, each Vendor must take the following precautions.

- A. Any trade secrets submitted by Vendor should be submitted separately in a sealed enveloped marked "Trade Secret – Confidential and Proprietary Information – Do Not Disclose Except for the Purpose of Evaluation this Response,
- B. Offer documentation specifying how the content qualifies as a trade secret under North Carolina law, and
- C. The "trade secret" should be stamped on each page of the trade secret materials contained in the envelope.

4. SCHEDULE AND PROCESS

The following chart shows the schedule of events to prepare your organization's response. The key events and deadlines for this process are as follows:

DATE	EVENT
September 24, 2020	Advertisement of RFP
October 12, 2020	Cut-off for Submitted Questions
October 26, 2020	Response Submission due by 5:00 p.m. on this date.
November 2020	Demos from top Bidders
December 2020	PWC anticipates awarding contracts on or before this date
January 2021	Vendors are expected to start on or before this date

Requests for information or clarification of this RFP must be made in writing and addressed to Nikole Subject at: nikole.subject@faypwc.com. Questions should reference the topic number. Vendor shall plainly mark the outside of the sealed envelope with the following information: SEALED BID: **RFP FOR FLEET MANAGEMENT SOFTWARE**, Vendor's name, address, proposal due date, and time. Communication regarding this RFP via any medium other than the designated fax number or e-mail address, including phone, personal visits, etc., is prohibited.

Vendors shall provide seven (7) copies of the proposal and include a flash drive containing a PDF version of their complete proposal. PWC will accept sealed proposals until 5:00 PM, TBD, in the PWC Procurement Office, 1st floor, PWC Administration Building, 955 Old Wilmington Road,

Fayetteville, NC 28301. Proposals received after the stated date and time will not be considered and will be returned to the Vendor unopened. Electronic proposals will not be accepted via email.

5. PROPOSAL CONDITIONS

5.1 Proposals must include the following information:

5.1.1 **Cover Letter** signed by an authorized individual who commits to the terms and conditions of the company's proposal.

5.1.2 **Executive Summary**, not to exceed two (2) pages. Include a description and history of the company, services provided and hands-on experience with specific software systems, along with an explanation of how the proposed solution best fits PWC's needs

5.1.3 **Statement of Qualifications** to demonstrate ability to meet RFP requirements:

- A. Include a description of office location(s), organizational structure, number of years in business, and annual revenue.
- B. Demonstrate capacity to fully perform all scope requirements, including experience, reliability, staffing capacity, competent subcontractors, and financial stability.
- C. Demonstrate understanding and experience of executing best practices related to fleet management software deployments and support.
- D. Provide names, qualifications, and percentage of time commitment for staff or other resources that will be assigned to PWC for this project. PWC reserves the right to accept or reject any proposed assigned staff or subcontractor.
- E. Provide resumes of project team members, to include subcontractors. Include time/experience with the Vendor.
- F. Provide a total number of W2 fulltime, 1099 contract, subcontract and any outsourced and offshore resources (Full-time/Contractors) for this project.
- G. Provide an organizational chart to demonstrate how the project team fits within the larger organization.
- H. Disclose any litigation you are currently involved in, or have been, within the past five (5) years in which the Vendor or your partners/subcontractors were a party.
- I. Provide details of how and why your company will best serve the needs of PWC.

5.1.4 **References** shall include contact information and project information for three (3) clients. References should include clients/projects similar in size and scope as described in this RFP that Vendor has served within the past three (3) years.

5.1.5 **Scope of Work** that includes a detailed account of how the Vendor will meet the requirements outlined in the RFP.

5.1.6 **Bid Summary Form** that includes cost details for the proposed services. Vendor must also attach a detailed cost explanation for each Bid Summary Form, include

line item detail for all expenses. Provide information on any options not included in the base fees and expenses.

- 5.1.7 **Vendor Compliance Worksheet** that identifies the ability of the vendor to meet specification requirements. If the specification can be met, but is not included in the base price, the price must be detailed on Bid form(s).

6. SCOPE OF WORK

Vendors are expected to submit a Scope of Work providing detail on the items below. This information is required in addition to completion of the Vendor Compliance Worksheet.

1. Product and Services

- a. Describe the product, to include all functionality.
- b. Describe characteristics that differentiate your solution from others in the industry.
- c. Provide detail on reporting, to include out of the box offerings, import/export options, and ad hoc functionality.
- d. Define user types and the role/functionality available to each.

2. Technical Information

- a. Describe delivery platforms available (SaaS is the preferred option). For each option (as applicable):
 - i. Describe the system architecture, design assumptions, database requirements, hardware/software, and operational considerations. Include information related to responsive or adaptive web designs available to accommodate various device types.
 - ii. Describe installation, maintenance, license requirements, and warranty support.
 - iii. Describe system administration, to include setup and maintenance and report/dashboard administration.
 - iv. Detail recommendation and approach for data conversion/migration.
 - v. Provide information on compatibility with Fleet support applications such as Street Eagle, Fuel Master Plus, and Lincoln Lube LFC600.
- b. Provide pricing detail for each platform using Bid Summary Forms and Detailed Cost Explanations.
 - i. Explain any additional software/hardware item that PWC may need to purchase.
 - ii. Provide detail on installation, administration, and maintenance costs, both pre and post deployment.

3. Implementation Plan

- a. Describe your implementation plan and timeline. Include detail on the approach, to include project management, change management, data conversion/migration, testing, and training.
- b. Describe approach to fit gap analysis to meet PWC requirements and avoid customizations.
- c. Define the proposed project implementation team, to include working hours, location, role, qualifications, and experience. Include staffing resource

requirements from PWC. Planned changes in key resources, such as Project Manager and technical leads must be approved by PWC.

- d. Describe deliverables provided for each phase of the implementation, to include documentation and acceptance criteria. Documentation must cover, at minimum, all installations, testing and training plans, configurations, processes, integrations, design diagrams, and any material related to the overall project.
- e. Identify issues and challenges PWC should anticipate in this software implementation and indicate how they are resolved using your system and services.

4. Support

- a. Describe warranty and technical support options for ongoing support after deployment.
- b. Describe any operational services available after warranty period ends.
- c. Describe any additional training/support options for users (phone support, remote diagnostics, conferences, etc.).

7. **EVALUATION OF PROPOSALS**

7.1 All qualified proposals will be reviewed and evaluated. At any time during the review, the PWC may request additional information from the Vendor. Such information request and Vendor's response must be in writing. Information may be requested from sources other than the submitted proposal to evaluate the Vendor.

7.2 Top bidders will be asked to provide a demonstration of the product.

7.3 Evaluation criteria will include, but will not be limited to:

- A. Strength and stability of the Vendor to provide the requested services
- B. Experience and success with similar projects of comparable size and scope
- C. Ability to meet the project timeline
- D. Overall responsiveness, viability and completeness of the proposal
- E. Demonstrated understanding of and ability to meet or exceed PWC's specifications
- F. Scope of goods/services being proposed
- G. Personnel/subcontractor qualifications
- H. Cost of proposed goods/services
- I. Any other facts considered relevant by the PWC

7.3 PWC reserves the right to select and negotiate with the successful Vendor any combination of bid line items and options.

APPENDIX A – Vendor Compliance Worksheet

Please provide a response for each line item. Provide the page number or section that addresses each line item in the “Vendor will Comply” column. If the vendor chooses “partially” for the “Vendor Will Comply” column, exceptions must be stated within that column. If the specification can be provided but is not included in the base price, price must be detailed on Bid forms.

ITEM #	SPECIFICATION	VENDOR WILL COMPLY (Fully/ Partially/ Not at All)	INCLUDED IN BASE PRICE (Yes/No)
1.0 – Equipment/Asset Management Module			
1.01	Maintain all pertinent data on each piece of equipment including, but not limited to, the following fields: <ul style="list-style-type: none"> • Equipment Number: unique number which identifies equipment Year • Make • Model • VIN/Serial Number: unique number • License: unique number for license plate • Class Code • Department • Billing Code: billing code to define how costs captured for this piece of equipment are to be billed. Multiple user defined billing schemes must be supported. • Company code • Color • 2 Location Codes (Parking slot and Site location) • Equipment priority code • Operator • Unlimited Account Codes for both Debit and Credit accounts 		
1.02	Display in the equipment module all parts issued and the last date issued for each piece of equipment.		
1.03	Provide the ability to define availability of each individual asset by hours, days and holidays.		

ITEM #	SPECIFICATION	VENDOR WILL COMPLY (Fully/Partially/ Not at All)	INCLUDED IN BASE PRICE(YES/NO)
1.04	Provide unlimited user-defined asset/equipment usage codes.		
1.05	Provide the ability to assign an employee/driver to an asset.		
1.06	Provide the ability to attach components expandable to multiple levels to an asset while maintaining a full asset record, warranties and PM schedules for each.		
1.07	Provide unlimited notes capability for an asset record.		
1.08	Have the ability to change an asset number and maintain all relevant data with the record.		
1.09	Track up to three different fuel types for one asset record.		
1.10	Provide the following fields for the capture of acquisition and disposal information for each asset record: <ul style="list-style-type: none"> • Acquire Date • Acquire Cost • Acquire Vendor • PO Number • Title • In Service Date • Life Expectancy Months • Out of Service Date • Disposal Date • Disposal Cost captured • Dispose Vendor 		
1.11	Track multiple meter types (miles/hours) and provide the ability to capture the following meter readings: <ul style="list-style-type: none"> • Actual Meter Reading • Meter Reading at Acquisition • Power Takeoff (PTO) Hours • Begin Fiscal Year Meter • Life Expectancy by M/H 		

ITEM #	SPECIFICATION	VENDOR WILL COMPLY (Fully/Partially/ Not at All)	INCLUDED IN BASE PRICE(YES/NO)
1.12	Provide the ability to replace a meter and maintain both actual and life-to-date (LTD) meter reading.		
1.13	Support the ability to bill each asset by multiple cost categories in user-defined combinations of parts, labor, sublets, and mileage, billing period charges, fuel and replacement recovery.		
1.14	Support multiple mark ups for parts, labor fuel and sublets.		
1.15	Track unlimited warranties for each asset by expiration date, cost, vendor, and any deductible or cost for the warranty.		
1.16	Provide unlimited user-defined codes that can be assigned by asset or by groups of assets.		
1.17	Provide the ability to charge multiple accounts and/or departments by percentage of cost.		
1.18	Provide the ability to assign both credit and debit account numbers to an asset and ability to modify with permissions.		
1.19	Track changes in departmental ownership.		
1.20	Store billing period charges for historical review, reproduction and reports.		
1.21	<p>Preventative Maintenance Tracking</p> <ul style="list-style-type: none"> • If an asset comes in for an unscheduled repair and a PM is due soon, create notification so PM can be completed. • Track unlimited PM cycles for each piece of equipment in any combination by time, meters, fuel consumption, a set monthly date or a set annual date. • Automatically update the next PM due when each job has been completed. • 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. • Provide ability to establish a hierarchy for PM services and define the highest level for the grouping. 		

ITEM #	SPECIFICATION	VENDOR WILL COMPLY (Fully/Partially/ Not at All)	INCLUDED IN BASE PRICE(YES/NO)
1.21 (con't)	<ul style="list-style-type: none"> • Easily create a shop schedule for a list of PMs due. • Allow the user to define what working days will be included on the schedule. • Provide the ability to define the total number and type of PM services included on the schedule. • Provide the ability to create a PM services repair record from the PM due listing. • Provide auto email PM Due capability. • Ability to have PMs scheduled on specific days. 		
1.22	Tracking of state inspections, annual fire inspections, annual renewals and any other site-specific inspections.		
1.23	<p>Vehicle Replacement</p> <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> ○ Date: date that the equipment was put in service. ○ Cost: amount of money paid to acquire the equipment. ○ Maint \$ LTD: the maintenance dollars spent to date. ○ Inflation Rate: estimated inflation rate for the equipment. ○ Salvage Rate: 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. ○ Fund: budgetary funding code for replacement of equipment. 		

ITEM #	SPECIFICATION	VENDOR WILL COMPLY (Fully/Partially/Not at All)	INCLUDED IN BASE PRICE(YES/NO)
1.23 (con't.)	<ul style="list-style-type: none"> ○ Major Grouping: administrative level group funding code. ○ Expected Life in Meters: shows the expected life from all valid meters attached to the equipment. ○ Expected Life in Months: the expected time, in months, that the equipment should last before replacement is necessary. ○ Recovery Collected: life-to-date amount of recovery collected through the billing process or separate update program. <p>Condition Factor: subjective administrative level input toward equipment replacement program.</p>		
1.24	<p>Automatically add to the acquisition cost any capitalization maintenance.</p> <ul style="list-style-type: none"> ● These costs should be tracked separately from maintenance and repair costs. ● Recalculates when capital repairs are added. 		
1.25	<p>Online display of historical information for each piece of equipment including:</p> <ul style="list-style-type: none"> ● Monthly or yearly totals by fiscal year or calendar year for: <ul style="list-style-type: none"> ○ Fuel costs and quantity ○ Meter type and cost/meter ○ Parts ○ Labor ○ Sublet ○ Credit ○ Accident ○ All parts issued to the equipment 		
1.26	<p>Display the following history fields by month or year:</p> <ul style="list-style-type: none"> ● Total Maintenance and Repair: the total maintenance and repair dollars spent on this equipment. 		

ITEM #	SPECIFICATION	VENDOR WILL COMPLY (Fully/Partially/ Not at All)	INCLUDED IN BASE PRICE(YES/NO)
1.26 (con't)	<ul style="list-style-type: none"> • Maintenance: the dollars spent on parts, labor and sublet costs for PM's. • Repair: dollars spent on parts, labor and sublet costs for all other repairs (non-PM's and non-accident repairs). • Accident: dollars spent on parts, labor and sublet costs for accident repairs. • Capital: dollars spent on parts, labor and sublet costs for capital repairs. • Miscellaneous Costs: dollars spent for work order miscellaneous costs such as shop supplies, environmental fees, etc. • Fuel Cost: costs associated with fuel. Fuel Qty: quantity of fuel used for the month or year. • Meter: type of meter. • Cost/Meter: costs attributed to this meter [(Maintenance + Repair)/Meter Reading]. • Meter/Gallon: costs of meter per gallon (Meter Reading/Fuel Qty.). • Parts: total dollars spent on parts for this equipment for selected period (not PM or accident part costs). • Labor: total dollars spent on labor for selected period. • Sublet: total dollars spent on sublet costs for this piece of equipment for selected period. Credit: total number of credit dollars given on this piece of equipment. • Accident: total dollars from accidents. • Other Fluid: amount of other fluids used in this equipment for the selected period. 		
1.27	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.		

ITEM #	SPECIFICATION	VENDOR WILL COMPLY (Fully/Partially/ Not at All)	INCLUDED IN BASE PRICE(YES/NO)
1.28	Link equipment warranties to repair codes for tracking warranty cost information.		
1.29	Track equipment warranties from the initial claims to re-imbursements received.		
1.30	Provide direct access to unlimited stored images associated with the piece of equipment.		
1.31	Templates – Ability to add multiple equipment records from a template including standard fields, PM Schedules & Warranty Schedules.		
1.32	Capability to add graphics, PDFs and notes to an equipment record.		
1.33	Within the equipment module, the ability to run user defined queries on the fly. The query should be exportable at a minimum to Microsoft Excel and Adobe PDF.		
2.0 – Parts Inventory/Processing & Management Module			
2.01	<p>Maintain all pertinent data on each part in inventory including:</p> <ul style="list-style-type: none"> • Part Number unique to one part • Part Description • In Stock Quantity • Item Cost • Part Category or classification • Part Type or distinct usage • Part Status • % Mark Up for the individual part • Location • Alternate Location • Vendor • Cross Reference Part(s) • Stock Quantities for max, low and safe. • Part Class Code • Max Issue: maximum quantity that can be issued to a work order at one time. • Order Lead Time 		

ITEM #	SPECIFICATION	VENDOR WILL COMPLY (Fully/Partially/ Not at All)	INCLUDED IN BASE PRICE(YES/NO)
2.01 (con't)	<ul style="list-style-type: none"> • Unit of Issue • Unit of Order • Multiplier: a number used to multiply by the unit of order to equal the unit of issue. 		
2.02	<p>Provide full audit tracking capabilities including the following adjustments by operator ID, date/time to:</p> <ul style="list-style-type: none"> • Unit cost • Count • Return to inventory • Return to vendor • Deleted orders • Deleted receipts • Transfers from one storeroom to another • Ability to delete from record incorrect parts that were issued erroneously 		
2.03	<p>Track purchases by:</p> <ul style="list-style-type: none"> • Vendor • PO Number • Order Number • Vendor Invoice • Date • Person placing the order • Person receiver the order Work Order Number 		
2.04	Capability to add graphics, PDFs and notes to a part record.		
2.05	Provide the capability to order, receive and issue a part on a work order from a single screen.		

ITEM #	SPECIFICATION	VENDOR WILL COMPLY (Fully/Partially/Not at All)	INCLUDED IN BASE PRICE(YES/NO)
2.06	<p>Have the capability to conduct online searches for purchases by:</p> <ul style="list-style-type: none"> • Invoice Number • Order Number • Part Number & Storeroom • Part Number • Purchase Order • Vendor • Work Order Number Part is for • Work Order Shop the Part has been ordered for 		
2.07	<p>Provide the ability to search for:</p> <ul style="list-style-type: none"> • All back orders • Orders not received • All orders received • Technician Issued to 		
2.08	<p>Track multiple part storerooms and carry a separate inventory in each storeroom for the same part numbers.</p>		
2.09	<p>Have online search capabilities for part records for the following:</p> <ul style="list-style-type: none"> • Alternative Part Number: an equivalent/alternative part number • Industry Part Class Code: STD Classification Part • Category: Code, which defines the manner in which parts are grouped. • Part Catalog Number • Description • Location • Manufacturer's Number: The number given to each part by the manufacturer • Material Safety Data Sheet # • Part Number • Part Usage Code 		

ITEM #	SPECIFICATION	VENDOR WILL COMPLY (Fully/Partially/ Not at All)	INCLUDED IN BASE PRICE(YES/NO)
2.09 (con't)	<ul style="list-style-type: none"> • Four (4) Site defined reference fields for parts • Part Status: Status of the part, i.e., active, closed • Storeroom • Vendor • Part Warranty Type 		
2.10	<p>Provide an online screen display with the following information when searching for part numbers:</p> <ul style="list-style-type: none"> • Part Number • Storeroom • Description • Location • In-Stock Quantity • Unit Cost • Reorder, Safety and High Limits <p>This should include the ability to go to the part record by selecting a part from the list.</p>		
2.11	Have the ability to conduct a wild card search on partial field information: partial description, partial part number, partial manufacturer number, etc.		
2.12	<p>Include the following information on the part record online, either by month or year:</p> <ul style="list-style-type: none"> • History of the part usage (issues, issues returned) Received, received returned • Transferred in, transferred out Adjusted up, adjusted down End of period quantity • Costs: unit, tax, shipping • Extended cost by the month or by year 		
2.13	Differentiate between stocked and non-stocked part records and offer all part capabilities for		
2.14	Track the issuance of all stocked and non-stocked parts to a specific piece of equipment.		
2.15	Have the ability to change a part number and have that change be reflected for all historical		

ITEM #	SPECIFICATION	VENDOR WILL COMPLY (Fully/Partially/ Not at All)	INCLUDED IN BASE PRICE(YES/NO)
2.16	Have a part number function that merges part records into one number while still retaining historical data.		
2.17	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.		
2.18	Provide an option to track warranty and receipt information for non-stocked parts issues.		
2.19	Price parts issued to work orders at a moving average.		
2.20	Generate a surplus parts report tracking lack of activity for user- defined periods of time.		
2.21	Have the ability to print bin labels.		
2.22	Provide a works list to assist in inventory counts.		
2.23	Have the ability to list all receipts by vendor for all parts, a category of parts or specific part numbers.		
2.24	Have the ability to generate a parts reorder list by vendor, category, part number or storeroom.		
2.25	Provide for ABC classification of parts where classifications, "A" parts are the top 20% of inventory, "B" parts are the next 30%, and "C" parts are the bottom 50% of inventory.		
2.26	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.		
2.27	Allow for a user-defined reasonableness percentage check on cost per parts received.		
2.28	Provide an online screen notes function and print capability for all part records.		
2.29	Have the ability to identify a mark-up percentage by part number.		
2.30	Track all credits to vendors by PO#, invoice #, date, type and description.		

ITEM #	SPECIFICATION	VENDOR WILL COMPLY (Fully/Partially/ Not at All)	INCLUDED IN BASE PRICE(YES/NO)
2.31	Automatically recalculate the total on the PO # when a credit is issued by vendor.		
2.32	Track multiple inventory storerooms and produce an audit trail for transfers among the storerooms.		
2.33	<p>Provide an EOQ calculation for the current values of the minimum level (reorder point), safety stock and maximum level from the actual order and issue history.</p> <ul style="list-style-type: none"> • Analyze which parts should be included in the EOQ • Calculation as a result of the EOQ program. Automatically enter the values for minimum, maximum and safety into the parts master record. 		
2.34	Support a cyclical inventory capability where every part is inventoried over a user-defined time period through a defined number of cycles.		
2.35	Have a parts list capability where lists are created, stored and printed for specific repairs on specific equipment number, year, make, model, class, etc.		
2.36	Provide direct access to unlimited stored images associated with each part, i.e., MSDS sheets.		
2.37	Provide parts cross referencing capability.		
2.38	<p>Support the use of barcoding. Print barcode labels including:</p> <ul style="list-style-type: none"> • Part Number • Description • Storeroom • Bin Location • Date Part Received 		
2.39	Provide the ability to track parts on back order.		

ITEM #	SPECIFICATION	VENDOR WILL COMPLY (Fully/Partially/ Not at All)	INCLUDED IN BASE PRICE(YES/NO)
3.0 – Technician Workstation Module			
3.01	Using a workstation on the shop floor, technicians can sign on/off to work orders as they begin and complete each repair.		
3.02	Provide the ability to add notes to the work order.		
3.03	Provide the ability to search for specific work orders and work previously performed on a piece of equipment.		
3.04	Provide searches for specific repairs and/or timeframes on a piece of equipment by: <ul style="list-style-type: none"> • Alternative Part Number: an equivalent part number • Industry Part Class Code • Part Category: a code that defines the way parts are grouped • Part Catalog Number • Description • Location • Manufacturer’s Part Number • Material Safety Data Sheet # • Non-Stock Parts • Part Number • Part Usage Code • Part Status: active, closed, etc. • Storeroom • Part Type • Vendor • Part Warranty Type 		
3.05	Provide the ability to search all assigned repairs by technician or by shop.		
3.06	Track indirect time without opening a work		
3.07	Provide ability to view documents attached to work orders.		
3.08	Provide ability to add repair lines.		
3.09	Ability to log on a job at start of shift, move job to job without “wait time” between punches.		

ITEM #	SPECIFICATION	VENDOR WILL COMPLY (Fully/Partially/ Not at All)	INCLUDED IN BASE PRICE(YES/NO)
3.10	Ability to offer/provide access to checklist for		
3.11	Ability for management to view what is assigned/in que to be assigned to technician.		
4.0 – Work Order Module			
4.01	Provide a simple work order add from one screen.		
4.02	Provide default information upon adding a work order that displays the following equipment information: <ul style="list-style-type: none"> • Year, make, model VIN/serial number • Engine size • AC • Transmission size • Tire size(s) Fuel types • GVW • Department Equipment class Site • Monitor code • License number • Color • Status • Replacement status • Replacement date • Warranties in effect for the equipment plus any attached component(s) • PM schedule for equipment plus any attached component(s) • Most recently stored meter reading(s) 		
4.03	Capture PM services, other repairs, sublets and miscellaneous costs/credits on a single work order.		
4.04	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.		

ITEM #	SPECIFICATION	VENDOR WILL COMPLY (Fully/Partially/ Not at All)	INCLUDED IN BASE PRICE(YES/NO)
4.05	Isolate all work of a specific type by a defined period and restrict the analysis to any department and/or class of equipment.		
4.06	Allow determination of cause, repair, work order and vehicle for any defined period on all parts issued.		
4.07	Record all commercial or sublet repairs to enable analysis by cause and repair code.		
4.08	Link a repair to an operator/driver/employee so driver abuse and accidents are identified and/or billed back.		
4.09	Display all active warranties and PM due messages for the equipment and associated components when the work order is opened.		
4.10	Provide job estimates that can be converted into active work orders.		
4.11	Print lists of parts and tasks required for any specific repair code.		
4.12	Provide the capability to view all work orders online in real time by status.		
4.13	Provide a real-time single screen review of the direct/indirect labor activities for all logged on technicians.		
4.14	Review online all work order detail information for quality control when a work order is closed.		
4.15	<p>Search for a work order by each (or a combination) of the following:</p> <ul style="list-style-type: none"> • Equipment number • Class of vehicle • Work order number • Technician identification • Date • Equipment Usage type • Repair code • Shop • Status of the work order 		

ITEM #	SPECIFICATION	VENDOR WILL COMPLY (Fully/Partially/ Not at All)	INCLUDED IN BASE PRICE(YES/NO)
4.16	Provide the ability for wild card (partial information) searches.		
4.17	Provide the ability to add notes and print them separately or with the work order.		
4.18	Provide the ability to add additionally required repairs to complete the work order.		
4.19	Alert the user when a repair is covered under a warranty.		
4.20	Provide the ability to defer repairs and automatically include them on the next opened work order for that piece of equipment.		
4.21	Provide the ability to assign deferred repairs to a specific technician and/or shop.		
4.22	Automatically display a technician specific screen listing any deferred repairs upon opening any work order.		
4.23	Alert technicians upon sign on that assigned repairs are pending.		
4.24	Require a specific authorization for closing a work order.		
4.25	Require specific authorization for reopening a closed work order.		
4.26	Provide an online summary review screen of all costs associated with each work order.		
4.27	Allow addition of user-defined costs to the work order including description and mark ups.		
4.28	Allow credits to the work order.		
4.29	Directly produce from the work order screen existing parts and tasks lists associated with any repair. These lists may be printed or reviewed online.		
4.30	Ability to create estimates for repairs on a separate tab from the work order.		
4.31	Ability to provide walk-around checklist.		
4.32	Provide warning when pending repairs and maintenance due within parameters set.		

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4.33	Allow all dealership recalls to be searched and viewed with asset number and type, as well as recall number assigned.		
4.34	Ability to automatically send parts lists for PM services to Parts Department.		
4.35	Ability to reopen a work order for required billing changes. Work order should display technician hours for each job and dollar amount, as well as work order totals.		
5.0 – Preventative Maintenance			
5.01	Generate a PM/annual/semiannual inspection due list by department, class, shop or date.		
5.02	Support PM frequency by time, miles/hours, fuel consumed or any combination thereof.		
5.03	Automatically update when the next PM is due upon completion of the current PM.		
5.04	Provide for PM scheduling that supports differences in age, usage and manufacturer.		
5.05	Allow for unlimited PM's and frequency of service for each piece of equipment.		
5.06	Track unlimited PM's for all components.		
5.07	Provide an option for hierarchical scheduling of PM's.		
5.08	Adjust for early/late hierarchically scheduled PM services.		
5.09	Include all associated components in a PM due report.		
5.10	Provide the ability for flexible PM scheduling based on shift and shop capacity.		
5.11	Provide the ability to manage or modify scheduled PM's.		
5.12	Provide an automatic PM Email Notification Program.		
5.13	Provide ability to have a PM "window" to perform PM and still be considered on time.		
5.14	Provide ability to have multiple PM schedules for one vehicle (bucket truck & chassis).		

ITEM #	SPECIFICATION	VENDOR WILL COMPLY (Fully/Partially/ Not at All)	INCLUDED IN BASE PRICE(YES/NO)
5.15	Provide ability for service writers to run PM reports and perform scheduling that is user-friendly and easy to disseminate to departments.		
6.0 – Availability and Downtime Tracking			
6.01	Allow creation of a user-defined downtime calendar for each piece of equipment. Options should include hours of service and available workdays including or excluding weekends and holidays.		
6.02	Store user-defined downtime.		
6.03	Track number of hours a work order is opened to calculate downtime for the piece of equipment.		
6.04	Allow the administrator to define downtime statuses.		
6.05	Provide ability to stop and re-start downtime.		
6.06	Provide downtime analysis of work by total and averages of: <ul style="list-style-type: none"> • Equipment • Class of equipment • Work order number • Department/division 		
6.07	Report user downtime by cause.		
6.08	Provide an online review of downtime by status.		
6.09	Provide the ability to track downtime on multiple work orders opened on the same piece of equipment.		
6.10	Availability to set operational hours for employees to aid in scheduling.		
6.11	Establish criteria for holidays, vacations, etc., for staff to aid in scheduling work.		
7.0 – Fuel Management Module			
7.01	Have the capability to track all fueling purchased in-house or commercially.		

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7.02	Provide the ability to track fuel by an individual or piece of equipment.		
7.03	Have the ability to view online fuel and operational fluids costs transactions and the accompanying meter reading.		
7.04	Provide search capabilities for fuel transactions by: <ul style="list-style-type: none"> • Site • User selected date range • Equipment number 		
7.05	Interface with multiple onsite automated fuel systems or commercial card programs.		
7.06	Provide the ability to manually enter fuel transactions.		
7.07	Maintain a perpetual inventory of fuel and other operational fluids.		
7.08	Track inventory receipts, issuances, stick readings and allow for moving average fuel charges.		
7.09	Track multiple alternate fuels.		
7.10	Ability to verify fuel transactions and correct errors during the import process. Should have the ability to see all fueling transactions and flag/adjust the meter readings in error.		
8.0 – Reporting – Reports to be included (but not limited to):			
8.01	Support a standard ad hoc report writer. Please provide the name of the recommended report writer.		
8.02	Provide standard reports that provide multiple sort and selection criteria along with drill down capabilities. Please provide a list of all standard reports		
8.03	Preventive Maintenance Due Comprehensive list of all PM's due within a specified date range and variable percentage of meter or fuel consumption.		

ITEM #	SPECIFICATION	VENDOR WILL COMPLY (Fully/Partially/ Not at All)	INCLUDED IN BASE PRICE(YES/NO)
8.04	<p><u>Equipment History Cost & Quantity</u> Detailed history of equipment costs by month and year, including all costs broken out by:</p> <ul style="list-style-type: none"> • Accident • Maintenance and repair • Fuel and other fluid quantities • Miles per gallon and cost per mile calculations 		
8.05	<p><u>Equipment/Asset</u></p> <ul style="list-style-type: none"> • Usage miles driven within a timeframe by equipment, class and/or department. • Scheduled maintenance due • Asset list with cost information • Asset replacement • Asset master list • Straight line depreciation • Asset inventory snapshot • History report 		
8.06	<p><u>Master Equipment List</u> Includes:</p> <ul style="list-style-type: none"> • year, make, model • department • class • acquired date with ability to sort by license number • Serial number or employee code 		
8.08	<p><u>Fuel</u></p> <ul style="list-style-type: none"> • Meter Exception – Identifies vehicles/operators with potential invalid meter info. • Fuel transaction report • Non-fueled assets • Fuel usage detail 		
8.09	<p><u>Vehicle Replacement</u> Identifies equipment to be replaced based on:</p> <ul style="list-style-type: none"> • In-service date and life expectancy • Non-metered equipment • System calculated vehicle replacement program 		

ITEM #	SPECIFICATION	VENDOR WILL COMPLY (Fully/Partially/ Not at All)	INCLUDED IN BASE PRICE(YES/NO)
8.10	<p><u>Average Equipment Age by Class</u> Average age of all vehicles in each equipment class.</p>		
8.11	<p><u>Equipment Audit</u> Audit trail of changes to company, department, equipment key and deletions in the system's equipment records.</p>		
8.12	<p><u>PM Compliance</u> Completed PM's flagging those done on time and showing the compliance percentage.</p>		
8.13	<p><u>Mileage Exception</u> Vehicles outside the minimum and maximum meter reading limits to identify high or low usage.</p>		
8.14	<p><u>Average Age for Disposed Equipment</u> Average age of disposed vehicles by company, department or class.</p>		
8.16	<p><u>Technician Efficiency</u> Tracking technician's individual efficiency rating against standard repair times.</p>		
8.17	<p><u>Technician productivity</u> Tracking indirect vs. direct time per technicians based on available hours. Ability to be modified to exclude indirect labor time by the user.</p>		
8.18	<p><u>Excel</u> Ability to run customizable reports from the table files using Excel or PDF.</p>		
8.19	<p><u>Operations</u></p> <ul style="list-style-type: none"> • Comeback – track individual comebacks and shop (re-work)percentages • Work order details by date report and work order 		

ITEM #	SPECIFICATION	VENDOR WILL COMPLY (Fully/Partially/ Not at All)	INCLUDED IN BASE PRICE(YES/NO)
8.19 (con't)	<ul style="list-style-type: none"> • Work order sublet by vendor • Work order dollar summary • Possible comeback report • PM labor percentage • Repair reason frequency • Fleet availability report • Technical labor activity report 		
8.20	<p><u>Deferred Maintenance</u> Ability to track and report of deferred maintenance and backlog work requests.</p>		
8.21	<p><u>Parts</u></p> <ul style="list-style-type: none"> • Parts inventory • Parts issue report • Vendor purchase order list • Parts received • Orders not received • Parts reorder report • Part transfer report • Vendor returns report • Inventory count sheet • Direct charge transactions • Parts surplus report • Parts obsolescence report • Inventory movement report • Part transaction detail report • Inventory discrepancy report 		
8.22	<p><u>Vehicle Utilization</u> Vehicle utilization report based on user defined parameters</p>		
8.23	<p><u>Dashboard</u></p> <ul style="list-style-type: none"> • A dashboard shall be provided to display at minimum the following: <ul style="list-style-type: none"> ○ Asset availability ○ Technician productivity ○ Shop turn-around ○ PM compliance 		

ITEM #	SPECIFICATION	VENDOR WILL COMPLY (Fully/Partially/Not at All)	INCLUDED IN BASE PRICE(YES/NO)
8.23 (con't)	<ul style="list-style-type: none"> ○ Cost per meter ○ Comeback repairs ○ Utilization ○ Open wo by status ○ Schedule/non-scheduled repairs comparison ○ Vendor compliance ○ Inventory turn ○ Average age of asset ● Dashboard will provide live data view without manual refreshes ● Dashboards will be available to Fleet and non-Fleet staff 		

APPENDIX B – Bid Proposal Summary Notes

1. PWC anticipates awarding contract(s) by December 2020 with an expected start date no later than January 2021 for the selected Vendor.
2. Vendor must provide all proposal components, to include Vendor Compliance Worksheet.
3. Vendor must attach a Bid Summary Form and detailed cost explanation, to include how price was derived and whether costs are included as base price or option price. If various service delivery, platforms, and/or pricing structures are available, multiple Bid Summary Forms are allowed.
4. Prices are firm fixed prices unless otherwise stated and shall be valid for acceptance by PWC for a period of 120 days from the RFP deadline date.
5. PWC reserves the right to select and negotiate with the successful Vendor any combination or all options quoted above.
6. The Vendor shall be subject to PWC travel policies. Travel expenses will be paid on a reimbursement basis.

APPENDIX C – Bid Summary Form

Line item detail must be attached.

OPTION # _____

Expense	Base Price	Proposed Options
Hardware		
Software (to be provided by Vendor)		
Additional Software (PWC required to purchase/upgrade)		
Subscription Fees (cloud-based services)		
Setup/Data Conversion		
System Interfaces (design, configuration, testing)		
Training		
Annual Support/Maintenance		
Warranties		
Other (please define)		
Travel (estimate)		
NC and Cumberland County Sales Tax		
TOTAL		

**SEE APPENDIX B: BID PROPOSAL SUMMARY NOTES
FOR MORE DETAIL ON PRICING REQUIREMENTS**