



Request for Proposals RFP#8-012 FLEET MANAGEMENT SERVICES

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**DUE: April 17, 2018
2:00 PM Mountain Time**

**Ogden City School District
Purchasing Department Room #210
1950 Monroe Blvd.
Ogden, Utah 84401**

A. Intent of Request for Proposal (RFP)

Ogden School District is seeking proposals for leasing, fleet management, and potential additional services as defined in the Eligible Applicants Section, of approximately 68 vehicles over a five (5) year period. **THIS IS A NON-GUARANTEED AMOUNT CONTRACT.** The District reserves the right to order any amount of leased vehicles and additional services it deems in the best interest of the District.

B. Purpose

The District intends to award a multiple year contract that will allow ordering to occur throughout a five (5) year period upon mutual agreement with the successful bidder and Ogden School District. Replacement or additional vehicles will be ordered under line items, and at prices applicable to the ordering period current at the time the replacement is made. Prices for future year ordering periods will be presented to the District by the awarded vendor in a timely fashion near the beginning of each ordering period. The District will accept or reject future order period pricing through amendment to the original agreement. Offerors will only submit pricing for the first ordering period time response to this RFP.

The District is soliciting a proposal to assess the approach it deems most cost effective for its needs. It is anticipated that this RFP will result in a single contract award to the responsive and responsible offeror with the highest score justified by the procurement code. Be advised that lease arrangements contemplated to extend more than one year will be subject to availability of appropriations.

The District will tentatively select a successful offeror by April 10, 2018, and will finalize a negotiated agreement within 30 days thereafter. Proposers will be given the opportunity to propose a phase-in schedule for initial vehicle deliveries. Replacement schedules for vehicles ordered under the contract will be established based on the conditions of the selected alternative.

C. Anticipated Timeline

Notification Date: March 26, 2018

Proposal Due Date: April 17, 2018

Final Notification of Award: TBD

D. Eligible Applicants

Applicants should meet the requirements listed under the Scope of Service Section.

E. Proposal Process

Proposals should be submitted with the information required in this RFP. **Each section must be labeled and in the order listed below.** Failure to comply may deem proposal non-responsive. As a minimum, proposals must include the following.

Section 1: Cover Letter

The cover letter must consist of:

1. Identification of Proposer, including name, address, and telephone number.
2. Acknowledgement of receipt of all RFP addenda, if any.
3. Name, title, address, email address, and telephone number of contact person during the period of proposal evaluation.

Section 2: Technical Proposal (Please label each of these sections as underlined)

The Technical Proposal should include the following six (6) items:

1. Qualifications and Related Experience: This section of the proposal should establish the ability of the proposer to satisfactorily perform the lease and fleet management services by reason of:
 - a. Experience in performing work of a similar nature.
 - b. Demonstrated competence in the services to be provided.
 - c. Strength and stability of the firm.
 - d. Staffing capability.
2. Proposer Profile: Proposer shall provide a brief profile of the individual or firm, the year founded; form of the organization (corporation, partnership, sole proprietorship); number, size and location of offices; and number of employees.
3. References: Proposers will provide a minimum of three (3) references that the District may contact for additional questions including name and phone number for each contact.
4. Detailed Description: Proposers shall provide a detailed description of the fleet management services offered as described in the Scope of Services including but not limited to:
 - a. Open-ended lease.
 - b. Maintenance program.
 - c. Physical damage program.
 - d. Vehicle resale process.
5. Firms Financial Conditions: Proposers shall provide a general description of the individual or firm's financial condition and identify any conditions; e.g., bankruptcy, pending litigations, planned office closures, impending merger, which may impede proposer's ability to provide lease and fleet management services.
6. Subcontractors in Utah: Proposers shall identify subcontractors (maintenance facilities) in the State of Utah by name, address and telephone number.

Section 3: Proposed Work Plan

Proposers shall provide a narrative that addresses the services they are proposing as outlined in the Scope of Service section. The narrative should show the Proposer's understanding of the Districts needs and requirements. Throughout the narrative, the Proposer shall include references for each area of services they are proposing. This section should also address the Proposer's plan to fulfill its obligations for the services.

Cost Proposal

Pursuant to Utah Code Annotated (UCA) § 63G-6a-707(6), the cost proposal will be evaluated independently from the technical proposal; and as such, **must be submitted separately from the technical proposal**. Offerors must not include costs or pricing data in their responses to the Technical Proposal. Please submit your cost proposal electronically on a USB flash drive in a separately sealed envelope (You may submit your electronic copy of your proposal on the same flash drive so that you do not have to send two separate flash drives).

Offeror must submit all completed Cost Proposal forms electronically that are attached to this RFP. The cost proposal forms are Cost Form Attachment A, Cost Form Attachment B, and Cost Form Attachment C. If an offeror fails to submit the completed cost proposal forms, then its proposal will be considered non-responsive and the proposal will be rejected.

Failure to submit cost or pricing data electronically on a USB flash drive will result in your proposal being judged as non-responsive and ineligible for contract award.

F. Proposal Questions

The Question and Answer period closes on April 10, 2018 at 12:00 pm. All questions must be submitted through SciQuest during the Question and Answer period <https://solutions.sciquest.com/apps/Router/SupplierLogin?CustOrg=StateOfUtah>. Answers from the School District will be posted on SciQuest. Questions may include notifying the School District of any ambiguity, inconsistency, scope exception, excessively restrictive requirement, or other errors in this RFP.

Questions may be answered individually or may be compiled into one document.

Questions may also be answered via an addendum. An answered question or an addendum may modify the specification or requirements of this RFP. Answered questions and addendums will be posted on SciQuest. Offerors should periodically check SciQuest for answered questions and addendums before the closing date. It is the responsibility of the Offerors to submit their proposals as required by this RFP, including any requirements contained in an answered question and/or addendums.

No other Ogden School District employee, Board Member, or evaluation committee member should be contacted concerning this RFP, during the selection process. Failure to comply with this requirement may result in disqualification.

G. Evaluation of Proposals

Stage 1: Initial Review

In the initial phase of the evaluation process, the conducting procurement unit will review all proposals timely received. Non-responsive proposals not conforming to RFP requirements or unable to meet the mandatory minimum requirements will be eliminated from further consideration.

Stage 2: Technical Proposal Evaluation

Responsive proposals will then be evaluated by an evaluation committee appointed by the conducting procurement unit against the proposal evaluation criteria noted in this RFP. Proposals will be evaluated against the evaluation criteria as follows:

- Responses to Technical Proposal and Proposed Work Plan (Section 2 and 3) – 15 points
- Lease Requirements (Scope of Services A) – 15 points
- Service and Maintenance Requirements (Scope of Services B)- 15 points
- Risk Management/ Physical Damage Requirements (Scope of Services C) – 15 points
- Description / Work Statement (Scope of Services B) – 10 points

Offerors that achieve minimum score threshold of 38 points will proceed to the Final Stage: Cost Proposal Evaluation. Offerors with a score of less than the minimum required technical points will be deemed non-responsive and ineligible for further consideration. The evaluation score sheet has been attached to this RFP. The attached evaluation score sheet states the relative weight that will be given to each evaluation criteria.

The evaluation committee, for this RFP, will tally the final scores for criteria other than cost to arrive at a consensus score by the following method: an average of the individual scores.

Final Stage: Cost Proposal Evaluation

Offerors successful in the technical evaluation will advance to the Final Stage: Cost Proposal Evaluation. There is a total of 30 cost points available. The total cost points will be added in based on the cost formula and methodology given in the Cost Forms.

Contract Award

The responsive and responsible offeror with the highest score justified by the procurement code will be awarded a contract.

H. Proposal Submission

In order to be considered for selection, your proposal must be received in the Purchasing Office (Ogden School District, 1950 Monroe Blvd., Room 210, Ogden, Utah 84401) **no later than 2 p.m. current Mountain Time on April 17, 2018.** 5 (five) paper copies and one (1) electronic copy (either emailed to crawfordk@ogdensd.org or flash drive) must be submitted (You may also submit 1 redacted copy of your proposal). The outside of the submittal must be labeled **RFP #8-012**. Proposals received after this deadline will be late and ineligible for consideration. Following the deadline, the names of those responding to the RFP will be available for public inspection.

I. Scope of Service

The District requires vehicles on a lease basis satisfying the specifications described in this section and may potentially require the additional services described in this section on an “as needed” basis. Proposers are expected to submit proposals that address all portions of this section. If a Proposer is unable to satisfy every element of this section but chooses to submit a proposal anyway, it must clearly identify the element(s) it is unable to satisfy and the reason it cannot meet the requirement. The District will review any exceptions taken but, at its sole discretion, may determine the proposal not responsive to the District’s requirements and remove it from further consideration.

1. LEASE REQUIREMENTS

For evaluation purposes, the District is requiring all Contractors to use the following lease parameters. Upon award, the District will negotiate with the awarded vendor the appropriate lease parameters the District deems necessary for each individual vehicle leased.

The following represents the District’s requirements for a lease:

- Five (5) year Open-Ended Lease with no mileage restrictions.
- Vehicles must be depreciated at 1.35% per month with a 19% Residual Book Value.
- Contractor must supply End of Term Balance at the end of the 60-month term.
- List all other applicable fees and charges.
- Maintenance as specified in “Scope of Maintenance” based on 5 years and 50,000 miles.
- Define reporting capabilities including monthly management reports, comprehensive invoicing, maintenance notification, and electronic capabilities.

2. SERVICE AND MAINTENANCE REQUIREMENTS

The District shall keep and maintain each vehicle in normal operating condition and be responsible for making sure all service, maintenance, and repair are performed to maintain the warranty. As the District deems necessary it may request maintenance

services to be included on select leased vehicles. (Please address the following questions):

Does your company provide a program in which the maintenance costs are billed back to the District as they occur?

Does your company provide a program in which the maintenance costs are fixed and guaranteed during the life of the lease?

If yes to either of these questions, please include the cost of program(s) in the pricing section and provide detail on program(s) including but not limited to:

- Location of facilities that will perform services
- Monitoring, tracking, and service needed notification capabilities / procedures
- Included and excluded items / coverage
- Compatibility with manufacturer's warranty

- Qualification requirements for those performing work on leased vehicles

3. RISK MANAGEMENT / PHYSICAL DAMAGE REQUIREMENTS (Loss of, Theft, or Damage Coverage)

As the District deems necessary it may request this service to be included in select instances.

Does your company provide this program?

If yes, please include the cost of this program in the pricing section and provide detail on your program including but not limited to:

- Deductibles
- Location(s) of service

4. DESCRIPTION/WORK STATEMENT

Project Organization and Management

The Contractor shall establish and maintain an appropriate organizational structure to enable local management of this contract. Documentation supporting the Contractor's ability to service the contract (including but not limited to office locations) should be included with the bid submission. All ordering will originate directly from the District.

Vehicle Quantities and Locations

The District fleet targeted to be satisfied by this lease contract consists of approximately sixty-eight vehicles. **THIS IS A NON-GUARANTEED AMOUNT CONTRACT**; the District reserves the right to order any amount of leased vehicles and

additional services it deems in the best interest of the District. Attached in a separate document is the list of the District fleet.

Vehicle Mileage and Term

The Contractor shall be able to support vehicle return and replacement as specified in the contract. The awarded Contractor may propose, and the District may consent to, a desired timeframe or mileage interval different than levels requested by the District, if such intervals provide advantages to the Contractor, the District, or both, such as lower lease prices due to better vehicle resale potential.

Vehicle Inspection

All vehicles leased under this contract shall be inspected, at which point vehicle inspection documentation will be provided indicating the general condition of the vehicle.

Condition of Leased Vehicles

Each vehicle furnished under this contract shall be of good quality and in safe operating condition. The District shall accept or reject the vehicles promptly after receipt. If the District determines that any vehicle is defective or unsafe at delivery, the District shall promptly inform the Contractor in writing.

SPECIAL CONTRACT REQUIREMENTS

Insurance and Liability

(a) The District is insured for liability coverage. The District shall be responsible for damage to:

- (1) Leased vehicles where such damage is not beyond economical repair, but the Contractor shall be liable for the following:
 - i. normal wear and tear,
 - ii. loss or damage caused by the negligence of the Contractor, its agents, or employees, and
 - iii. damage covered by the manufacturer's warranty or damage attributable to a manufacturing defect; and
- (2) Property of third persons, or the injury or death of third persons, where such damage results from the fault, negligence, or wrongful act or omission of the Government, its agents, or employees.

(b) The Contractor shall provide and maintain insurance covering its liabilities. The insurance requirements are listed in the terms and conditions attached with this solicitation.

(c) The Contractor shall certify to the Procurement Department in writing that the required insurance has been obtained. The policies evidencing required insurance should contain an endorsement to the effect that any cancellation or any material change adversely affecting the contract is to be performed as prescribed, or until 30 days after written notice to the Procurement Department, whichever period is longer. The policies shall exclude any

claim by the insurer for subrogation against the District by reason of any payment under the policies.

Price Guarantee

Offeror must guarantee its pricing for one year.

If allowable under this RFP, a request for price adjustment must be made at least thirty (30) days prior to the effective date. A request for price adjustment must include sufficient documentation (market analysis) supporting the request. Any price adjustment will not be effective unless approved by the Ogden School District. A price adjustment will be guaranteed for the same length of time as the original price guarantee. The conducting procurement unit will be given the immediate benefit of any decrease in the market, or allowable discount.

Legal Information and Disclaimers:

1. BID PREPARATION: (a) Delivery time is critical and must be adhered to as specified. (b) Wherever in this document an item is defined by using a trade name of a manufacturer and/or model number, it is intended that the words, "or equivalent" apply. "Or equivalent" means any other brand that is equal in use, quality, economy and performance to the brand listed as determined by Ogden School District. If the supplier lists a trade name and/or catalog number in the bid, Ogden School District will assume the item meets the specifications unless the bid clearly states it is an alternate, and describes specifically how it differs from the item specified. All bids must include complete manufacturer's descriptive literature if quoting an equivalent product. All products are to be of new, unused condition, unless otherwise requested in this solicitation. (c) By submitting the bid the supplier certifies that all of the information provided is accurate, that they are willing and able to furnish the item(s) specified, and that prices quoted are correct. (d) This bid may not be withdrawn for a period of 60 days from bid due date.

2. FREIGHT COST: (a) Where "Freight Cost" is listed as a separate line item, suppliers are to provide product line item pricing FOB Origin Less Freight. On the line item for "Freight Cost", suppliers are to indicate the total freight cost FOB Destination Freight Prepaid, and complete the "Freight Information" document. Ogden School District will analyze freight charges separately from the item cost and determine how the shipment will be routed (either by the supplier, or by the State's carrier). (b) Where there is not a line item for "Freight Cost", suppliers are to provide line item pricing FOB Destination Freight Prepaid. Unless otherwise indicated on the contract/purchase order, shipping terms will be FOB Destination Freight Prepaid.

3. Protected information: Pricing may not be classified as confidential or protected and will be considered public information.

Process for Requesting Non-Disclosure: Any Bidder requesting that a record be protected shall include with the bid a Claim of Business Confidentiality. To protect

information under a Claim of Business Confidentiality, the Bidder must complete the Claim of Business Confidentiality form with the following information:

Provide a written Claim of Business Confidentiality at the time the information (bid) is provided, and

- Include a concise statement of reasons supporting the claim of business confidentiality (Subsection 63G-2-309(1)).
- Submit an electronic “redacted” (excluding protected information) copy of the proposal. Copy must clearly be marked “Redacted Version.”

An entire bid cannot be identified as “**PROTECTED**”, “**CONFIDENTIAL**” or “**PROPRIETARY**” and shall be considered non-responsive unless the Bidder removes the designation.

Redacted Copy: If a Bidder submits a bid that contains information claimed to be business confidential or protected information, the Bidder **MUST** submit two separate proposals: one redacted version for public release, with all protected business confidential information either blacked-out or removed, clearly marked as "Redacted Version"; and one non-redacted version for evaluation purposes clearly marked as "Protected Business Confidential."

All materials submitted become the property of Ogden School District. Materials may be evaluated by anyone designated by the district as part of the bid evaluation committee. Materials submitted may be returned only at the district's option.

Standard Terms and Conditions

Any contract resulting from this RFP will include, but not be limited to the Standard Terms and Conditions. The Standard Terms and Conditions have been attached with this RFP.

Exceptions and/or additions to the Standard Terms and Conditions are strongly discouraged. However, Offerors requesting exceptions and/or additions to the Standard Terms and Conditions must be submitted with the proposal. Exceptions and/or additions submitted after the date and time for receipt of proposals will not be considered. Offerors may not submit requests for exceptions and/or additions by reference to a vendor's website or URL. URLs provided with a proposal may result in that proposal being rejected as non-responsive. Offerors may submit questions during the Question and Answer period regarding the Standard Terms and Conditions.

The district may refuse to negotiate exceptions and/or additions that are determined to be excessive; that are inconsistent with similar contracts of the procurement unit; to warranties, insurance, or indemnification provisions that are necessary to protect the

procurement unit after consultation with applicable legal counsel; where the solicitation specifically prohibits exceptions and/or additions; or that are not in the best interest of the procurement unit.

For any proposed change(s), Offeror must provide Ogden School District's Standard Terms and Conditions for this solicitation in Microsoft Word format with redline edits. Additional terms or documents must be submitted in separate Microsoft Word documents. Offeror must also provide the name, contact information, and access to the person(s) that will be directly involved in legal negotiations.

Any mandatory required acceptance of an Offeror's terms and conditions may result in the proposal being determined to be non-responsive.

An award resulting from this RFP is subject to successful contract terms and conditions negotiation (if required). The district may reject a proposal if the offeror who submitted the proposal fails to sign a contract within 90 days after the contract award.