



*Connecting State and University Fleets Since 1986*

## **REQUEST FOR PROPOSAL**

### **National Conference of State Fleet Administrators**

**NATIONAL CONFERENCE OF STATE FLEET ADMINISTRATORS (NCSFA)**

Date Issued: **January 16, 2018**

TITLE: **BENCHMARKING SERVICES FOR NATIONAL  
CONFERENCE OF STATE FLEET  
ADMINISTRATORS**

PRE-PROPOSAL CONFERENCE:

**JANUARY 26, 2018  
11:00 AM EST**

PROPOSAL DELIVERY ADDRESS:

[tmorrison@amrms.com](mailto:tmorrison@amrms.com)

DEADLINE FOR SUBMITTING PROPOSAL:

**February 1, 2018 at 4:00 p.m. Eastern Standard Time**

RFP ADMINISTRATOR:

**Tommy Morrison, NCSFA Association Director  
Phone: 859-402-9805  
Email: [tmorrison@amrms.com](mailto:tmorrison@amrms.com)**

# SECTION 1

## INTRODUCTION/BACKGROUND

### 1.0 INTRODUCTION

The National Conference of State Fleet Administrators (NCSFA) is seeking expert data collection, data analytics, benchmarking, and publishing services for information maintained by its member agencies. The purpose of obtaining these services is to provide the means necessary for the Association to compile industry and participant data, establish industry standards of measure, and create tools for NCSFA and its member agencies.

The projects goals and objectives are:

**Goal 1:** To inform and educate members with metrics that they can use to improve their fleet programs

**Goal 2:** Formalize and publish standards of measurement that are relevant to government fleets

**Goal 3:** Establish a reference document that will give NCSFA membership the necessary information to leverage with their leadership to modify programs

**Goal 4:** Increase NCSFA's prominence and position organization to stand as the source of government fleet metrics

### 1.1 BACKGROUND

NCSFA's mission is to lead, connect and represent fleet administrators from state government and public universities. NCSFA provides an environment to foster growth in professional development of its members through networking with peers, educational opportunities and information sharing that includes a comprehensive benchmarking report. NCSFA's vision is that it will become the leading association for state government fleet administrators and empower sponsors to serve the fleet industry.

NCSFA is governed by an eleven-member Executive Committee consisting of its President, President Elect, Vice-President, Secretary-Treasurer, three Members-at-Large, Immediate Past President, and Industry Representative. The Executive

Committee is responsible for the direction of the Association's policies and affairs.

The National Conference of State Fleet Administrators (NCSFA) is a non-profit organization with approximately 120 dedicated fleet professionals. Our professional organization serves the needs of members who manage fleets of automobiles, SUVs, trucks, vans, and a wide range of specialized mobile equipment for customers in many of the state and university owned fleets throughout the United States.

## **1.2 DEFINITIONS OF TERMS**

The following terms used in the RFP documents shall be defined as follows:

**“Administrator”** means AMR Management Services, which provides administrative support to NCSFA.

**“The Executive Committee”** means the governing board of the National Conference of State Fleet Administrators

**“NCSFA”** means the National Conference of State Fleet Administrators, and shall be synonymous with the term “Association.”

**“Proposer”** means a respondent to this RFP.

**“RFP”** means this Request for Proposal.

**“RFP Administrator”** means the NCSFA administrator representative serving as the primary point of contact for this RFP as identified on page 1 of this RFP.

## **1.3 CONTRACTING OPPORTUNITY & TERM**

NCSFA reserves the right to establish a contract with a provider pursuant to this RFP. The initial term of any contract(s) awarded pursuant to this RFP shall be mutually agreed upon by the NCSFA and the selected firm.

## **1.4 RFP CONTACT PROPOSAL**

The Executive Committee and the Administrator are committed to ensuring that all Association business transactions, including its search and procurement processes, are based strictly on integrity, competence, merit and benefit to its member agencies and their participants. As a matter of policy, Executive Committee members and staff will not separately communicate with current or prospective vendors or their representatives, or any other person or organization, for the purpose or intent of having a particular vendor secure or maintain a contract or business with the Association, or otherwise realize financial gain from the Association, whether during or outside of a procurement process. The RFP can be made available to current corporate partners of NCSFA, but current corporate partner in an NCSFA leadership role will be excluded from the proposal reviewing process.

In support of this, and to ensure the transparency and objectivity of this procurement process, all communications and questions regarding or related to the services included in this RFP should be directed as follows:

- *Tommy Morrison, NCSFA Association Director  
 AMR Management Services  
 201 E. Main Street, Ste. 1405  
 Lexington, KY 40507  
 859-402-9805  
 tmorrison@amrms.com*

## 1.5 GENERAL INFORMATION AND PRE-PROPOSAL CONFERENCE

### 1.5.1 Proposal Timeline

The following is the current timeline for the RFP process. The Executive Committee reserves the right to adjust this schedule. Changes to the timeline, if any, will be posted online as an RFP Addendum.

Target Dates	Event
January 16, 2018	Request for Proposal Released
January 22, 2018	Deadline for receiving written questions for the Pre-Proposal Conference is 4:00 p.m. ET
January 22, 2018	Deadline to register to participate in Pre-Proposal Conference by telephone is 4:00 p.m. ET
January 26, 2018	Pre-Proposal Conference at 11:00 a.m. ET
<b>February 1, 2018</b>	<b>RFP responses due by 4:00 p.m. ET</b>
<b>February 1 thru March 1, 2018</b>	Evaluation of Responses
<b>March 2, 2018</b>	Commencement of Services (tentative)
<b>July 15, 2018</b>	Completion of Project

### 1.5.2 Pre-Proposal Conference

A Pre-Proposal Conference will be held to provide information regarding the RFP requirements and answer questions from prospective proposers. The conference has been scheduled for **January 26, 2018, at 11:00am Eastern Standard Time**. Potential proposers may participate by telephone. If you intend to participate, please pre-register by contacting Tommy Morrison at 859-402-9805 or via email at [tmorrison@amrms.com](mailto:tmorrison@amrms.com) no later than **January 22, 2018, at 4:00 p.m. Eastern Standard Time**. The RFP Administrator will provide a call-in number at that time.

### **1.5.3 Questions Regarding the RFP**

To maximize the effectiveness of the conference, to the extent possible, proposers should provide questions in writing prior to the conference. The deadline to provide questions for responses at the Pre-Proposal Conference is **January 22, 2018 at 4:00 p.m. Eastern Standard Time**. This will enable the RFP Administrator to prepare responses in advance.

Specific questions concerning the RFP should be submitted in writing via e-mail to Tommy Morrison at [tmorrison@amrms.com](mailto:tmorrison@amrms.com). All questions should identify the RFP section and page number for each question submitted. Additional questions may be accepted and addressed at the conference. However, responses may be deferred and posted online as addenda to the RFP at a later date. To ensure the fair and consistent distribution of information, all questions will be answered in writing and distributed at the Pre-Proposal Conference and available online.

Subsequent questions regarding the RFP should be in writing and sent via e-mail to the RFP Administrator. NCSFA will make every effort to respond to all written questions as soon as practical. Responses to questions, or any other changes to or interpretation of the RFP, will be shared with all proposers.

### **1.6 PROPOSAL SUBMISSION DEADLINE**

Response to this RFP must be received by the RFP Contract Administrator no later than **4:00 p.m. Eastern Standard Time on February 1, 2018**. The Executive Committee reserves the right to extend the Proposal Submission Deadline.

# SECTION 2

## SCOPE OF SERVICES

### 2.1 DATA COLLECTION

The selected vendor would develop and administer a survey and/or online self-reporting functionality for the purpose of gathering various data items identified by NCSFA and the vendor. The selected vendor will need to provide the following services relative to collecting this data:

- Establish a survey/system and protocols in cooperation with NCSFA for NCSFA member agencies to submit their data.
- Conduct a web based survey or provide self-reporting functionality.
- Communicate effectively with member agencies for the purpose of achieving high rates of responsiveness, address interpretive questions from member agencies, clarify, and validate the information provided.

In addition, NCSFA will be considered the owner of the data.

### 2.2 REPORTING & BENCHMARKING

The selected vendor will utilize the survey data to create summary statistics on identified key performance indicators in state and university fleet management. The summary data will visually communicate industry standards for individual member comparison. The summary data will be presented in the report to allow ease of viewing and extraction of industry data.

The selected vendor will work with NCSFA to develop the analytic tools necessary to establish a framework for benchmarking member agencies within NCSFA on key metrics as defined by NCSFA, relative to those member agencies and, where data is available, against broader universes of fleet management data. The selected vendor will work closely with NCSFA in defining and customizing these metrics.

### 2.3 PUBLISHING & DISTRIBUTION

The selected vendor will provide publishing services for the completed report. In addition, the vendor will also distribute a hard copy of the report to members.

# SECTION 3

## Evaluation Criteria

### 4.1 Evaluation Categories

All proposals will be evaluated on the following criteria and weights:

1. Method of Performance (25%)
2. Cost (15.1%)
3. Quality of Company Expertise (11.6%)
4. Consultation (10.5%)
5. Timeline (7.0%)
6. Reference Checks (5.8%)
7. Publishing Services (5.8%)
8. Quality of Value Added Services (4.7%)

### 4.2 Mandatory Specifications

Corresponding to the evaluation categories, Proposers must include or address the following items to be considered for the award:

**4.2.1 Method of Performance:** Proposers must provide a comprehensive description of methodologies and proposed design of the administration of the survey and following analysis. Address specifically how data will be captured, how anomalies in the data will be resolved, and how it will be ensured survey respondents are replying with like data. Provide strategy of how data will be analyzed and presented.

**4.2.2 Cost:** The Proposer should provide an all-inclusive total cost for the completion of the project and broken out costs for each scope of the project (data collection; reporting and benchmarking; printing and distribution). The Executive Committee reserves the right to negotiate with any or all bidders or request best final offers.

**4.2.3: Reference Checks:** Proposers will provide a minimum of three references of clients for which a similar initiative was executed.

**4.2.4 Quality of Company Expertise:** Proposers must provide staff qualifications, company financials, and samples of similar projects.

**4.2.5 Value Added:** Potential value-added services must be listed and priced by proposers.

**4.2.6 Publishing Services:** A summary of publishing strategies including what publishing forms will be offered and corresponding costs.

**4.2.7 Timeline:** A proposed timeline of key checkpoint dates with deliverables must be provided. Also provide a projected measure of effort.

**4.2.8 Consultative:** Provide a list of key fleet metrics and key performance indicators that would provide the basis for the surveying, data collection, and benchmarking efforts.

Minimum Mandatory Requirements	RFP Section	Evaluation				
1 Proposal addressed all items in response	??	PASS				
2 Vendor provided three references	??	FAIL				
3 Vendor provided a timeline that meets deadline	??	PASS				
4 Vendor provided company resumes	??					
5 Vendor provided samples	??					
6 Agree to the ownership and use of the data/sur	??					
		Do Not Proceed				
Scoreable Technical Criteria	RFP Section	Evaluate or Score	Criteria Weight	% of Tech Criteria	Points Possible	Total
1 Execute survey including design, data capture, analysis, comparisons and pre/post survey	Method of Performance	0	18	10.5%	90	0
2 How resolve anomalies within the data?	Method of Performance	0	10	5.8%	50	0
3 Ensure survey respondents are replying with like data?	Method of Performance	0	10	5.8%	50	0
4 Define/demonstrate a high level of confidence in the data	Method of Performance	0	15	8.7%	75	0
5 Quality of Company Expertise	Company Resumes	0	20	11.6%	100	0
6 Quality of Reference Checks	Reference Checks	0	10	5.8%	50	0
7 Quality of Provided Samples	Provided Samples	0	15	8.7%	75	0
8 Provided Timeline	Timeline	0	12	7.0%	60	0
9 Quality of Value Added Services	Value Added	0	8	4.7%	40	0
10 Publishing Services and Final Product	Publishing Services	0	10	5.8%	50	0
11 Identification of Key Fleet Metrics and Key Performance Indicators	Consultation	0	18	10.5%	90	0
12 Cost	Cost	0	26	15.1%	130	0

# Section 4: Bid Submission

## 4.1 Specifications

The Proposer should provide a comprehensive proposal which clearly articulates how the presented goals will be met. Proposers should present information in a clear and concise, comprehensive manner. Additionally, provide a summary of what resources you will need from NCSFA to complete the project.

## 4.2 Bid Formatting

Proposals should be prepared simply and economically providing a straightforward, concise description of the Vendor's abilities to satisfy the requirements of the RFP. Emphasis should be placed on completeness and clarity of the content. The proposal will include a title page, sections corresponding to the categories in weighted order, and utilize page numbers. The Proposer should submit their proposal as a Portable Document Form (PDF).

## 4.3 Bid Submission

**All bids must be signed and delivered by the RFP Contract Administrator no later than 4:00 p.m. Eastern Standard Time on February 4, 2018.** Any bid received by NCSFA is considered to be in the possession of NCSFA and will not be returned for any reason. The vendor shall submit their proposal via email to [tmorrison@amrms.com](mailto:tmorrison@amrms.com)

# SECTION 5

## Award

### 5.1 Evaluation Process

A Review Committee will be designated by the NCSFA Executive Committee to evaluate/score the proposals and generate recommendations for selection to the Committee. Following the Committee's selection, the award of the contract is subject to successful negotiation of the terms and conditions of an agreement.

**5.1.1 Written Responses** – All responses to the RFP questionnaire that meet mandatory specifications will be considered and evaluated. NCSFA reserves the right not consider proposals that do not include the mandatory specifications identified in Section 4.

**5.1.2 Review Panel Interview** – The Review Committee will conduct interviews for the purpose of clarifying each proposer's responses to written responses. NCSFA reserves the right to exclude from interviews those firms whose scores relative to the RFP questionnaire have rendered them unviable for selection.

### 5.3 Scorecard Availability

Based upon request, the Review Committee's summary scorecard can be made available to the proposer. This scorecard will not include scorer's names nor individual scores.

### 5.4 Award

Award will be made in accordance with the best interest of NCSFA.

## Attachment A

The following is a sample list of broad categories of data with some sample data items that may be included in the data sets that NCSFAA would be interested in acquiring from its membership. **Neither these categories, nor the samples listed, are intended to be exhaustive or final.** NCSFA anticipates working closely with both the selected service provider as well as its membership to refine this list, and further expects that this list will evolve over time.

**Our primary interest is in working with a provider to develop a data collection that is flexible enough for NCSFA to customize and have evolve over time.** NCSFA does not expect that all NCSFA members will maintain all data. However, as the data set evolves, and members become aware of the data available, they may begin to create this data for their plans if they have an interest in benchmarking their results against other member agencies. In any event, NCSFA is interested in collecting any portions of this data that its members may maintain.

DATA CATEGORIES & SAMPLE DATA POINTS
<b>Fleet Organizational Structure</b>
Agencies Supported
Online Travel Cost Estimating Tool
Vehicle Count
Vehicles with Tracked Utilization Cost
Full time Employees
Location of Purchasing Decisions
Fleet Management Responsibilities
Miles Traveled
Current Odometer
Months in Service
<b>Replacement, Purchasing and Rates</b>
Vehicle Purchase Expenditures
Replacement Spending
Base Purchasing Price
Purchasing Priorities
Long Term Internal Lease Practices
Long Term Leasing Formulas
Short Term Internal Lease Practices
<b>Maintaining, Repair and Recalls</b>
Vehicle Maintenance and Repair Expenditure
Maintenance and Repair Costs Per Mile by Vehicle Class
Average Labor Rates

Maintenance Compliance
Oil Change Intervals
Replacement Criteria
Replacement Funding
Purchasing Contracts
Managing Recalls
Recalled Vehicles
Recall Concerns

<b>Fuel</b>
Fuel Expenditures
Average Miles Per Gallon
Vehicles by Fuel Type
Purchasing Mandates For Vehicles
Fuel at Commercial Sites
Commercial Fuel Cards
Fuel Reduction Strategies

<b>Utilization</b>
Use Policies
Minimum Standards
Current Annual Utilization

<b>Telematics</b>
Telematics Use
Implementing Telematics
Requests for Data
Return on Investment and Telematics Integration
Cost for Telematics