



Request for Proposal

VEHICLE LEASE AND FLEET MANAGEMENT SERVICES

Community Action Partnership of San Bernardino County

DUE DATE FOR SUBMISSION:
Friday, January 27, 2017

Community Action Partnership of San Bernardino County
Contact person: Richard Schmidt, Chief Financial Officer
696 S. Tippecanoe Avenue San Bernardino, CA 92408-2607
Phone Number: (909) 723-1518 – Email: rschmidt@capsbc.org

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Purpose of Request

Community Action Partnership of San Bernardino County (CAPSBC) is a 501(c)3 nonprofit serving San Bernardino County since 1965. CAPSBC works with our low-income communities by supporting, advocating for and empowering low-income residents to achieve self-sufficiency. We are seeking proposals for vehicle leasing and fleet management services. The purpose of the Request for Proposal (RFP) is to solicit competitive proposals to identify vendors that are well qualified, professional and have the capacity to provide high quality services that meet the needs of our organization at an affordable price.

Questions & Clarifications

The following contact is to be used for all questions and clarifications:

Richard Schmidt, Chief Financial Officer
Community Action Partnership of San Bernardino County
696 S. Tippecanoe Ave.
San Bernardino, CA 92408
Office: (909) 723-1518
Email: rschmidt@capsbc.org

Submission Deadline

Proposals may be submitted electronically or in person. The submission deadline is on: Friday January 27, 2017 no later than 5:00 PM.

Submission Delivery Address

rschmidt@capsbc.org

Or

Community Action Partnership of San Bernardino County
Attention: Richard Schmidt, CFO
696 S. Tippecanoe Ave.
San Bernardino, CA 92408

Proposed Schedule

CAPSBC will maintain the following timeline in selecting a qualified organization that can meet our needs:

Issue Request for Proposal	January 11, 2017
Deadline for Submission of Proposals	January 27, 2017
RFP Award Notification	February 10, 2017

Detailed Scope of Services

All bidders must include in their proposal the following information:

1. **Cover Page of Proposal** – Provide vendor contact information to include, name, address, phone number, website, and email address.
2. **Summary** – Provide a summary of your company (including: primary person of contact for the RFP, company name, address, telephone number and email address) signed by the person authorized to bind the organization.

3. **Purchase of Agency Fleet** – CAPSBC owns the vehicles set forth in the attached Exhibit A – ‘Agency fleet of vehicles’. The successful bidder shall purchase the vehicles from CAPSBC or market the vehicles for sale to third parties. An estimate of the value of each vehicle is requested. For the estimates, assume that the vehicles are in fair to good condition. Please provide a high, low, and average estimated value of each vehicle.

4. **Vehicle Lease** –

- a. **Vehicle leasing** – CAPSBC estimates that it will lease the following types of vehicles: 3 mid-size sedans, 5 mini-vans, 13 cargo vans, 4 stake-bed pick-up trucks with lift gates, 7 extended cab pick-up trucks, and 12 (10’-12’) box trucks. CAPSBC will work with the bidder to set up a phase-in plan for the leasing of these vehicles.

This is an estimate of the number and types of vehicles that we anticipate to lease over the next 24 months and obtain fleet management services thereon. CAPSBC reserves the right to change the vehicle lease terms, including but not limited to, increasing or decreasing the number of vehicles, changing the type of one or more vehicles, increasing or decreasing the annual mileage on one or more vehicles to greater or lesser than 12,000 miles, and obtaining or not obtaining fleet management services as to any vehicle.

- b. **Pricing** – All pricing shall be based on 12,000 miles per year and shall not include any costs of loaner vehicles. All pricing should be based on a 60 month lease.

5. **Fleet Management Services** – The selected bidder shall tailor a program to provide “Fleet Management Services” to CAPSBC that includes, at a minimum, the services listed below:

- a. **Fleet vehicle management** – Dedicated account team to: (A) manage and develop CAPSBC’s fleet of vehicles; (B) advise and assist on vehicles and equipment selection based on the needs of CAPSBC; (C) handle licensing and registration of vehicles leased to CAPSBC; (D) cost and quality controls for vehicle maintenance and repairs; (E) monthly management reports and monthly single invoice of all charges related to each leased vehicles.
- b. **Maintenance, repair, and management** –
 - i. The selected bidder shall provide maintenance and repair facilities within 50 miles of our base location – 696 S. Tippecanoe Ave. San Bernardino, CA 92408.
 - ii. Factory-recommended preventative maintenance services as per the schedule prescribed by the original equipment manufacturer (e.g., oil changes and tune-ups) to be performed at industry standard intervals.
 - iii. Incidentals and parts required for preventative maintenance, including but not limited to, fluids, belts, hoses, ignition and emission components.
 - iv. Process for documenting vehicle repair services from initiation to closure.
 - v. Quality assurance program for all maintenance and repair services.
 - vi. Strategies for minimizing repair times and vehicle downtime.
 - vii. Process for monitoring the repair process, e.g., time, labor rates, parts used, quality of repair, and driver satisfaction.
 - viii. Coordination with and monitoring of repair facilities for maintenance and repairs of vehicles.

- ix. Maintenance and repair related information reports to be prepared by the contractor and submitted to CAPSBC including: (1) monthly summary cost reports of repairs and maintenance, and (2) warranty monitoring and warranty claim services, including securing extended warranty.
 - c. **Customer services** – That includes the following: (1) local contact person available Monday through Friday, 7:00 am to 5:00 pm; (2) quarterly, semiannual, and annual vehicle fleet reviews with CAPSBC; and (3) emergency roadside assistance 24 hours per day/7 days a week.
- 6. **Cost of Services** – A budget needs to be provided that outlines in detail your proposed cost for both leasing services and fleet management services. A budget narrative must be included that describes how all costs were determined in your proposal. The proposal must represent the final pricing including additional fees, discounts, and taxes. The bidder must use the pricing schedule in the attached Exhibit B – ‘Pricing schedule’.
- 7. **Qualifications** – CAPSBC shall have the sole and exclusive right to determine whether a bidder has the qualifications to provide the leasing and services required by this RFP. CAPSBC will consider, but is not limited to, the following:
 - a. **Experience** – Provide your organization’s relevant experience – e.g., previous projects of similar nature, staff’s years of experience, stakeholders and or client base, communities served, cultural competencies and quality services model. Service delivery – types of services provided and what your services include. Also, timelines in which you can provide services.
 - b. **References** – The bidder must submit 3 references. CAPSBC may contact these references and/or other entities or persons to verify, clarify, or obtain additional information.
 - c. **Additional Documentation and Information** – CAPSBC may request from any bidder clarification or additional information or documentation regarding or relating to the qualifications to furnish the required vehicles and perform the required services, as well as any other information pertinent to the contractor’s response to the RFP. Upon CAPSBC’s request, a bidder shall promptly submit to CAPSBC such additional information or documentation. A bidder’s failure or refusal to submit any clarification, information, or documentation requested by CAPSBC may result in CAPSBC’s rejection of the response to the RFP.
- 8. **Questionnaire** – At the same time that a bidder submits its bid, the bidder shall complete and submit the questionnaire in Exhibit C – ‘Questionnaire’. A bidder’s failure or refusal to complete the questionnaire may result in rejection of the bid. CAPSBC will use the questionnaire to evaluate the bidder’s qualifications to furnish the required vehicles and perform the required services.

Selection Criteria

Proposals will be evaluated on the following factors: A, B, C, and D.

Factors	Weight
A. Response of the written proposal to the detailed scope of services.	15
B. Overall service delivery approach.	20
C. Ability and history of successfully completing contracts of this type, meeting projected deadlines, and experience in similar work.	30
D. Cost of services.	35
	100%

Right to Change RFP and Process

CAPSBC reserves the right to accept or reject any and all submissions, in whole or in part, to advertise for new submissions, to abandon the need for services and to cancel or amend this RFP at any time. CAPSBC reserves the right to waive any formalities or minor deficiencies in the RFP process, consistent with CAPSBC's best interest.

Solicitation Caveat

Bidders understand and agree that CAPSBC shall have no financial responsibility for any costs incurred in responding to this RFP and shall not be liable for any costs until the bidder has executed a contract with CAPSBC and has been authorized in writing to proceed. CAPSBC reserves the right to terminate this RFP. The submission of a proposal shall be conclusive evidence that the bidder has investigated and understands, to its own satisfaction, the conditions to be encountered, the character, quality and scope of work to be performed, the requirements of CAPSBC and the applicable regulations as set forth in this RFP.

Exhibit A – Agency fleet of vehicles

	Year	Type	VIN	License	Odometer
1	2004	FORD F-150 PICKUP TRUCK	1FTRX12WX4KB47964	8N54587	117,756
2	2004	FORD F-150 PICKUP TRUCK	1FTRX12W54NB02106	8N54588	119,020
3	2005	FORD TAURUS	1FAFP53285A288731	6DDS486	89,396
4	2005	FORD FREESTAR PASSENGER VAN	2FMZA50665BA07283	5MPT1517	84,929
5	2006	FORD F-150 PICKUP TRUCK	1FTRX12W26KB30630	8N54749	68,925
6	2006	FORD E-350 CARGO VAN	1FTSS34L56DB37400	8N54675	120,517
7	2008	CHEVY 10' EXPRESS CARGO VAN	1GBHG31K181168207	8V76407	84,524
8	2008	CHEVY 10' EXPRESS CARGO VAN	1GBHG31K081170322	8V76409	100,816
9	2008	CHEVY 10' EXPRESS CARGO VAN	1GBHG31K781170561	8V76411	111,269
10	2008	CHEVY 10' EXPRESS CARGO VAN	1GBHG31KX81168111	8V76408	87,716
11	2008	CHEVY 10' EXPRESS CARGO VAN	1GBHG31K281169656	8V76410	73,572
12	2009	CHEVY 1500 CREW CAB SILVERADO	3GCEC13C49G187762	8V76412	75,946
13	2009	CHEVY 1500 CREW CAB SILVERADO	3GCEC13C19G103123	8V76414	46,065
14	2009	FORD F-350 STAKE BED TRUCK	1FDWF36R68EA03267	8R66249	67,429
15	2010	FORD F-150 PICKUP TRUCK	1FTEX1CW7AKB67999	8Z64623	79,643
16	2010	FORD F-150 PICKUP TRUCK	1FTEX1CW1AFB09881	8Z64620	86,534
17	2010	FORD F-150 PICKUP TRUCK	1FTEX1CW0AFB96978	8Z64622	59,406
18	2010	FORD F-150 PICKUP TRUCK	1FTEX1CW2AFB08612	8Z64619	65,837
19	2010	FORD E-350 CUTAWAY VAN	1FDSE3FL1ADA65779	8U24179	78,064
20	2010	FORD E-350 CUTAWAY VAN	1FDSE3FL0ADA86669	8U24187	65,446
21	2010	FORD E-350 CUTAWAY VAN	1FDSE3FL7ADA86670	8U24181	60,955
22	2011	FORD E-350 CARGO VAN	1FTSE3EL6BDA31585	8Z41222	57,778
23	2011	FORD E-350 CARGO VAN	1FTSE3EL1BDA31588	8Z41224	68,684
24	2011	FORD E-350 CARGO VAN	1FTSE3EL8BDA31586	8Z41223	60,676
25	2011	FORD E-350 CARGO VAN	1FTSE3ELXBDA31587	8Z41246	61,322

Exhibit B – Pricing Schedule

Vehicle Type	A Make/Model/Model Year of Vehicles (list up to 3 vehicles)	B 60 Month Lease (B1 - B4 below is <u>per vehicle</u> to be leased. B5 - B6 are for <u>all vehicles</u> leased.)					
		B1 Down payment amount (incl. any taxes and fees) Specify all taxes and fees in the budget narrative	B2 Monthly lease payment (Incl. any taxes and all fees) Specify all taxes and fees in the budget narrative	B3 Monthly fee for fleet management services	B4 Monthly depreciation rate	B5 Initial vehicle lease amount	B6 Total monthly amount
Mid-size sedan		\$ _____	\$ _____	\$ _____	_____ %	B1 X 3 vehicles \$ _____	(B2 + B3) X 3 vehicles \$ _____
Mini-van		\$ _____	\$ _____	\$ _____	_____ %	B1 X 5 vehicles \$ _____	(B2 + B3) X 5 vehicles \$ _____
Cargo van		\$ _____	\$ _____	\$ _____	_____ %	B1 X 13 vehicles \$ _____	(B2 + B3) X 13 vehicles \$ _____
Stake-bed pick-up truck with lift gate		\$ _____	\$ _____	\$ _____	_____ %	B1 X 4 vehicles \$ _____	(B2 + B3) X 4 vehicles \$ _____
Extended cab pick-up truck		\$ _____	\$ _____	\$ _____	_____ %	B1 X 7 vehicles \$ _____	(B2 + B3) X 7 vehicles \$ _____
10' - 12' box truck		\$ _____	\$ _____	\$ _____	_____ %	B1 X 12 vehicles \$ _____	(B2 + B3) X 12 vehicles \$ _____
Totals						Sum of column B5 \$ _____	Sum of column B6 \$ _____

Exhibit C – Questionnaire

IMPORTANT: THIS QUESTIONNAIRE IS PART OF THE BID AND MUST BE COMPLETED AND SUBMITTED WITH THE BID FORM. PLEASE READ AND FOLLOW ALL INSTRUCTIONS AND COMPLETE CAREFULLY THIS QUESTIONNAIRE. Each bidder must answer all questions, fill in all blanks, and provide all required documentation. Any errors, omissions, or misrepresentation of information may be grounds to reject the bid or to cancel any award of the Contract.

SECTION A: BIDDER INFORMATION AND CONTACT

1. Full legal name of bidder:

2. Bidder's federal tax identification number:

3. Any DBA name(s):

4. Business Address:

5. Business Phone No.:

Business FAX No:

6. Name and title of person completing this Questionnaire:

7. Is bidder a corporation? If yes, complete the following:

- List state of incorporation:
- Date incorporated:
- List the name and title of each officer of bidder:

8. Is bidder a partnership? If yes, list the following:

- Date of formation:
- State of formation:

9. Is bidder a sole proprietorship?

10. Is bidder or any of its owners, partners, or officers connected with other entities as a subsidiary, parent, holding company or affiliate? If yes, provide the following information:

- Name and Address of Entity
- State of Formation/Incorporation
- Relation to Bidder (e.g., parent, subsidiary)
- Lines of Business

11. Has there been any change within the past five years, or are there any changes pending or anticipated, in the control of bidder (e.g., change in owners or management personnel, or acquisition or merger with another entity)? If yes, please explain:

SECTION B: EXPERIENCE, PERFORMANCE, AND REFERENCE

12. Describe bidder’s business and operations within the last 10 years.

City/State Name of Business Years in Business Type of Business

13. Describe bidder’s vehicle leasing program and available services:

 Number of years during which bidder has leased vehicles:

14. Does bidder presently perform fleet management services as part of its normal operation? If yes, provide the following information:

- Number of years during which bidder has performed fleet management services:

15. Describe bidder’s fleet vehicle management program and available services:

16. Describe the team that will be responsible for providing fleet management services to CAPSBC, including, at a minimum, the name, title, responsibility, and experience of each member of the team:

17. Does bidder have any fleet management office located in or within 50 miles of our base location: 696 S. Tippecanoe Ave. San Bernardino, CA 92408? If yes, please state each location:

Please list contact information for at least three clients for whom bidder has provided fleet management services stated below. Bidder hereby authorizes CAPSBC to contact such clients regarding the fleet management services that bidder provided to them.

Agency Name Name/Title of Contact Person Phone No.

18. Describe bidder’s vehicle maintenance and repairs program, and maintenance and repair services and parts that are covered thereunder:

19. Describe bidder’s maintenance management program:

20. Describe bidder’s process and requirements for handling maintenance or repair services that are not covered by bidder’s vehicle maintenance program:

21. Does bidder maintain or contract with any repair facility to provide maintenance and repair services of vehicles in or within 50 miles of our base location: 696 S. Tippecanoe Ave. San Bernardino, CA 92408? If yes, state each location or provide a list of such repair facility(ies):

22. Describe bidder’s insurance and accident services, and risk management programs:

23. Describe bidder’s process and timeline for selection and delivery of leased vehicles:

24. In the past 10 years, has bidder or any of bidder’s owners, officers, or partners been found liable in a civil suit or found guilty in a criminal action for making any false claim or material misrepresentation to any public agency? If yes, explain:

25. Explain bidder’s process for managing and resolving complaints for all parties involved:

26. Have you ever been banned from doing business with the federal government?

SECTION C: VERIFICATION

I, the undersigned, hereby certify and declare that I have read all of the answers to this questionnaire and know their contents. The matters stated in such answers are true of my own knowledge and belief. I certify and declare under penalty of perjury under the laws of the State of California that the foregoing answers contained in this questionnaire are true and correct.

Signature_____

Dated_____

Print name_____

Title_____