

REQUEST FOR PROPOSALS

FLEET MAINTENANCE SOFTWARE (REBID)

THE SCHOOL BOARD OF MIAMI-DADE COUNTY, FLORIDA

PROPOSAL RETURN DATE

November 20, 2003

RFP: #045-DD10

THE SCHOOL BOARD OF MIAMI-DADE COUNTY, FLORIDA
BUREAU OF PROCUREMENT AND MATERIALS MANAGEMENT
1450 N.E. 2ND AVENUE, MIAMI, FLORIDA 33132

REQUEST FOR PROPOSALS #045-DD10

FLEET MAINTENANCE SOFTWARE (REBID)

Sealed proposals will be accepted in the Bureau of Procurement and Materials Management, at the above location, until 2:00 P.M. on **November 20, 2003** and may not be withdrawn for ninety (90) days from that date.

ANTI-COLLUSION STATEMENT

THE UNDERSIGNED PROPOSER HAS NOT DIVULGED TO, DISCUSSED, OR COMPARED HIS PROPOSAL WITH OTHER PROPOSERS AND HAS NOT COLLUDED WITH ANY OTHER PROPOSER OR PARTIES TO THE PROPOSAL WHATSOEVER.

PROPOSER ACKNOWLEDGES THAT ALL INFORMATION CONTAINED HEREIN IS PART OF THE PUBLIC DOMAIN AS DEFINED BY THE STATE OF FLORIDA SUNSHINE LAW.

CERTIFICATION AND IDENTIFICATION FOR CONTRACTORS SUBMITTING PROPOSALS.

I certify that this proposal is made without prior understanding, agreement or connection with any corporation, firm or person submitting a proposal for the same service, and is in all respects fair and without collusion or fraud. I agree to abide by all conditions of these proposal specifications and I certify that I am authorized to sign this proposal.

(Please Type or Print Below)

LEGAL NAME OF AGENCY OR
CONTRACTOR SUBMITTING PROPOSAL : _____

MAILING ADDRESS : _____

CITY STATE, ZIP CODE : _____

TELEPHONE NUMBER : _____

BY: SIGNATURE : _____

BY: TYPED : _____

TITLE : _____

INSTRUCTIONS TO AGENCY/CONTRACTOR SUBMITTING PROPOSAL

I. PREPARING OF PROPOSALS

- A. THE PROPOSAL IS TO BE SUBMITTED, using 8-1/2" x 11" paper.
- B. IDENTIFICATION. Failure to indicate the contractor's EXACT legal name and an unsigned proposal may be considered non-responsive.

II. SUBMITTING OF PROPOSALS

- A. Number of Proposal:

A total (15) of the Proposal must be submitted as follows:

- * The original proposal in a sealed envelope or box marked "Original."
- ** (14) copies of the proposal in a separate sealed envelope or box marked "Copies."

The proposal number, proposal title and opening date must be clearly marked on all envelopes and boxes.

- B. Place, Date and Hour. Proposals shall be submitted to The School Board of Miami-Dade County, Florida, Procurement and Materials Management, Room 352, 1450 N.E. 2nd Avenue, Miami, Florida, not later than 2:00 P.M. November 20, 2003.

III. CHANGE OR WITHDRAWAL OF PROPOSAL

- A. PRIOR TO PROPOSAL OPENING. Should the agency or individual contractor withdraw its proposal they shall do so in writing. This communication is to be received by the Assistant Superintendent, Procurement Management Services, 1450 N.E. 2nd Avenue, prior to November 20, 2003. The agency or individual contractor's name and the proposal number should appear on the envelope.
- B. AFTER PROPOSAL OPENING. After November 20, 2003, proposals may not be changed; and they may not be

withdrawn for ninety (90) days from that date.

IV. PROTEST TO CONTRACT SOLICITATION OR AWARD

- A. The Board shall provide notice of a decision or intended decision concerning a solicitation, contract award, or exceptional purchase by electronic posting. This notice shall contain the following statement:

"Failure to file a protest within the time prescribed in Section 120.57(3), Florida Statutes, shall constitute a waiver of proceedings under Chapter 120, Florida Statutes."

- B. Any person who is adversely affected by the agency decision or intended decision, shall file with the agency a notice of protest in writing within 72 hours after the posting of the notice of decision or intended decision. With respect to a protest of the terms, conditions, and specifications contained in a solicitation, including any provisions governing the methods of ranking proposals or replies, awarding contracts, reserving rights of further negotiation or modifying or amending any contract, the notice of protest shall be filed in writing within 72 hours after the posting of the solicitation. The formal written protest shall be filed within 10 days after the date of the notice of protest is filed. Failure to file a notice of protest or failure to file a formal written protest shall constitute a waiver of proceedings. The formal written protest shall state with particularity the facts and law upon which the protest is based. Saturdays, Sundays, and state holidays shall be excluded in the computation of the 72-hour time periods provided by this paragraph.
- C. The notice of protest will be reviewed by Procurement Management Services staff, which will offer the protesting proposer the opportunity to meet and discuss the merits of the protest. If the protest is not resolved, the proposer may seek an administrative hearing pursuant to 120.57 Florida Statute, by filing a formal written protest within 10 days after filing the notice of protest. Petitions for hearing on protests pursuant to 120.57 Florida Statutes must be filed in accordance with School Board Rule 6Gx13-8C-1.064.

V. AWARDS

- A. **RESERVATION FOR REJECTION OR AWARD.** The Board reserves the right to reject any and all proposals, to waive irregularities or technicalities, reject any or all proposals and to request re-bids.
- B. **NOTIFICATION OF INTENDED ACTION.** Notices will be posted on the

District's website 7-10 days prior to a regularly scheduled Board meeting.

C. OFFICIAL AWARD DATE. Awards become official upon Board action.

VI. DEFAULT

In the event of default, which may include, but is not limited to non-performance and/or poor performance, the awardee shall lose eligibility to transact new business with the Board for a period of 14 months from date of termination of award by the Board. Proposers that are determined ineligible may request a hearing pursuant to §120.569, Fla. Stat., and School Board Rule 6Gx13-8C-1.064.

VII. PUBLIC ENTITY CRIMES

Section 287.133(2)(a) Florida Statute. A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a proposal on a contract to provide any goods or services to a public entity, may not submit a proposal on a contract with a public entity for the construction or repair of a public building or public work, may not submit proposals on leases of real property to a public subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017, for CATEGORY TWO for a period of 36 months from the date of being placed on the convicted vendor list.

VIII. COMPLIANCE WITH FEDERAL REGULATIONS

All contracts involving Federal funds will contain certain provisions required by applicable sections of Title 34, Section 80.36(I) and Section 85.510 Code of Federal Regulations and are included by reference herein. The vendor certifies by signing the proposal that the vendor and its principals are not presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from participation in Federally funded transactions and may, in certain instances, be required to provide a separate written certification to this effect.

During the term of any contract with the Board, in the event of debarment, suspension, proposed debarment, declared ineligible or voluntarily excluded

from participation in Federally funded transactions, the vendor shall immediately notify the Assistant Superintendent, Procurement Management Services, in writing.

Vendors will also be required to provide access to records, which are directly pertinent to the contract and retain all required records for three years after the grantee (The Board) or sub-grantee makes final payment.

For all contracts involving Federal funds, in excess of \$10,000, The Board reserves the right to terminate the contract for cause, as well as for convenience, by issuing a certified notice to the vendor.

IX. CONE OF SILENCE

Board Rule 6Gx13- 8C-1.212

Definition:

- A. "Cone of Silence" means a prohibition on any communication regarding a particular Request for Proposals (RFP), bid, or other competitive solicitation between:
1. any person who seeks an award therefrom, including a potential vendor or vendor's representative; and
 2. any School Board member or the member's staff, the Superintendent, Deputy Superintendent and their respective support staff, or any person appointed by the School Board to evaluate or recommend selection in such procurement process.

The Cone of Silence shall not apply to communication with the School Board Attorney or his or her staff, or with designated school district staff who are not serving on the particular Procurement Committee, to obtain clarification or information concerning the subject solicitation. For purposes of this section, "vendor's representative" means an employee, partner, director, or officer of a potential vendor, or consultant, lobbyist, or actual or potential subcontractor or sub-consultant of a vendor, or any other individual acting through or on behalf of any person seeking an award.

- B. A Cone of Silence shall be applicable to each RFP, bid, or other competitive solicitation during the solicitation and review of bid

proposals. At the time of issuance of the solicitation, the Superintendent or the Superintendent's designee shall provide public notice of the Cone of Silence. The Superintendent shall include in any advertisement and public solicitation for goods and services a statement disclosing the requirements of this section.

- C. The Cone of Silence shall terminate at the time the Superintendent of Schools submits a written recommendation to award or approve a contract, to reject all bids or responses, or otherwise takes action which ends the solicitation and review process.
- D. Nothing contained herein shall prohibit any potential vendor or vendor's representative:
 - 1. from making public representations at duly noticed pre-bid conferences or before duly noticed selection and negotiation committee meetings;
 - 2. from engaging in contract negotiations during any duly noticed public meeting;
 - 3. from making a public presentation to the School Board during any duly noticed public meeting; or
 - 4. from communicating in writing with any school district employee or official for purposes of seeking clarification or additional information, subject to the provisions of the applicable RFP, or bid documents.

The potential vendor or vendor's representative shall file a copy of any written communication with the School Board Clerk who shall make copies available to the public upon request.

- E. Nothing contained herein shall prohibit the Procurement Committee's representative from initiating contact with a potential vendor or vendor's representative and subsequent communication related thereto for the purposes of obtaining further clarifying information regarding a response to an RFP, or competitive solicitation. Such contact shall be in writing and shall be provided to the members of the applicable Procurement Committee, including any response thereto.
- F. Any violation of this rule shall be investigated by the School Board's

Inspector General and may result in any recommendation for award, or any RFP award, or bid award to said potential vendor or vendor's representative being deemed void or voidable. The potential vendor or vendor's representative determined to have violated this rule, shall be subject to debarment. In addition to any other penalty provided by law, violation of this rule by a school district employee shall subject the employee to disciplinary action up to and including dismissal.

Specific Authority: 1001.41(1)(2); 1001.42(22); 1001.43(10) F.S.

Law Implemented, Interpreted or Made Specific: 1001.43(10); 1001.51(14) F.S.

History: THE SCHOOL BOARD OF MIAMI-DADE COUNTY, FLORIDA

New: 6-18-03

The School Board Of Miami-Dade County, Florida
Request For Proposals No. 045-DD10 (REBID)
Fleet Maintenance Software

REQUESTOR AND INSTRUCTIONS FOR SUBMISSION OF PROPOSALS

NAME AND ADDRESS OF REQUESTOR

Miami-Dade County Public Schools (M-DCPS)
Department of Transportation / Vehicle Maintenance
15401 S.W. 117th Ave
Miami, FL 33177

INSTRUCTIONS FOR SUBMISSION OF PROPOSALS

Fifteen copies of this proposal, one of which must be an original and 1 CD-ROM or diskette, must be received by **2:00 p.m. (Eastern Daylight Time) on November, 20 2003** at:

The School Board of Miami-Dade County, Florida
Bid Clerk, Division of Procurement Management
1450 N.E. Second Avenue, Room 352
Miami, FL 33132

The proposal must be submitted in a sealed envelope or box marked "Proposals to provide Fleet Maintenance Software." It is anticipated that a proposal may be presented to The School Board of Miami-Dade County, Florida (School Board), for acceptance in January 2004. The School Board reserves the right to reject any and all proposals.

GENERAL INFORMATION

The School District seeks a vendor to provide Fleet Maintenance Software that will enable the Vehicle Maintenance Division the ability to improve the management of its fleet maintenance program. The users of this system may include, but is not limited to, Miami-Dade County Public Schools, Department of Transportation (DOT), and the Office of Information Technology Services (ITS). The software is intended to help meet the District goal of improving the efficiency of the business management practices. Specifically within the DOT, the need to improve the efficiency of vehicle maintenance is essential. DOT has undergone several audits during the past year and each audit has identified the need to implement a new software system that will allow for total systems integration to account for and report data related to the maintenance of vehicles and auxiliary equipment. The District is now moving toward implementing these audit recommendations.

One of the most important tasks DOT vehicle maintenance division performs is the planning and scheduling of school bus monthly safety inspections (MSI) as required by Florida Statutes. The system must have the ability to plan and schedule MSI in the most efficient and effective arrangement based on available school day(s) calendar and shop available resources.

This functionality will be reviewed closely during the vendor demonstration, as well as comments from vendor clients and site visits. DOT wants the ability to analyze the software to assist in tracking all life-cycle cost pertaining to repairs and maintenance of any type of vehicle or

equipment in order to determine life-cycle optimization for vehicle replacement. The system must have the ability to distinguish or separate maintenance repairs from non-maintenance jobs, such as operational improvement requests, warranty claims, and manufacturer recall reimbursements among others. This capability must be available at the job or task level within a work order. DOT also wants the ability for real-time application, thus updating all files, as the transactions occur, concurrently.

The District is seeking a software solution that can demonstrate proven usage in fleet maintenance of auto, trucks or transit organizations. The software provider must have installations in the United States where it can be observed in normal operation.

The system must operate from a centralized database using Microsoft SQL server for the backend, thereby eliminating the need to backup data files from different locations. The system must operate in a true client-server mode in a wide area network (WAN) utilizing full T1 digital line (1.544Mbps) and TCP/IP as the transport protocol. The system must be capable of handling as many as 100 users accessing the database at any one time and be scalable for additional users in the future. The system must be capable of joining a Windows 2000 domain using Windows authentication and group policy. Access security based on roles within each software package/module/screen. The available system should allow for the definition/designation of authorized personnel for specific tasks that can only be modified by an authorized system administrator. Audit trails of the users entries should be maintained in the system and are reportable to the District.

DOT wants to use the software to assist in the management of its available resources in maintaining its fleet of vehicle and equipment. The software should have the ability to recognize failure trends, analyze the data and provide reports to management. Management will in turn, develop action plans based on the information available to drive changes for improvements.

BACKGROUND

The School Board of Miami-Dade County, Florida (the "District") is a political subdivision organized under the Section 4, Article IX, of the State Constitution and Chapter 230, Florida Statutes. The School Board is the fourth largest school system in the nation with an annual budget of over \$4 billion for fiscal year ending June 30, 2002. Student enrollment totals over 360,000 with over 350 school sites. There are over 47,000 full-time and part-time employees.

Management of the School Board is totally independent of the metropolitan and city governments. The School Board is the policy-making body of the District. The School Board consists of nine (9) members elected by district. Among other duties the School Board has broad financial responsibilities, including approval of the annual budget and establishing a system of accounting and budgetary controls. The School Board appoints the Superintendent of Schools. The Superintendent's ten (10) direct reports are responsible for managing the District.

The School District is located along the southeast tip of the Florida peninsula and covers 1,955 square miles and is the largest metropolitan area in the State of Florida. It is bounded by Biscayne Bay and the Atlantic Ocean to the east, Everglades National Park to the west, the Florida Keys to the south, and Broward County to the North. One-third of the County itself is located in the Everglades National Park. Most of the 2.2 million residents live on the eastern side of the county in an urban environment.

The Department of Transportation / Vehicle Maintenance Division currently employs over 300 full time personnel, 130 of which are wrench turning mechanics. The Vehicle Maintenance Division is responsible for the ongoing maintenance of more than 3800 vehicles, in addition to attached

equipment such as lifts, generators, and aerals just to name a few. Units include, but are not limited to School Buses, Heavy-Duty trucks, Light-Medium Duty Trucks, Vans & Automobiles. The maintenance is performed out of 9 remote terminals/garages throughout the district and is supported by centralized administration and parts warehouse.

Florida law requires that all school buses are inspected every 30 school days, and all out-of-service criteria are repaired before the bus is returned to service.

GENERAL PROPOSER REQUIREMENTS & QUALIFICATIONS

COMPLIANCE WITH REGULATORY AUTHORITIES

The software services proposed must comply with all applicable federal, state and local guidelines in addition to all M-DCPS' Board Rules and internal procedures in effect as of the date of the proposal. The proposer must be capable of demonstrating their commitment to updating and maintaining the proposed service(s) to ensure that they remain in compliance with these requirements.

VENDOR/PRODUCT BACKGROUND

Financial Viability

- 1) Proposers must provide the following information regarding their company:
Proposers must be able to demonstrate that they have the necessary financial resources to devote to the project. Evidence of this must be indicated by capitalization of the Proposer's firm, the history of the firm, the corporate structure, the number of years the proposer has been in business. The proposer shall provide, at the time of interviews/demonstrations/testing, its current financial statement, which can be retrieved upon completion of the presentation. Failure to present this information shall cause the proposal not to be considered for award. Additional information is also required.
 - a) Bankruptcy information of proposer or affiliated firm for which proposer has a controlling interest. Please explain if applicable.
 - b) Type of company (owned, public, private, corporation)
- 2) Please indicate whether or not there has been any legal action against your company during the past five years. If yes, please explain.

Staffing and Customer Service

- 1) Proposers must provide the names, titles, and resumes indicating qualifications, education, and experience of the key individual responsible for supporting the offered software.
- 2) Proposers must describe the role of each key individual, who will be servicing the District's account.
- 3) Technical support must be available from the time a signed contract is complete and easily accessible thereafter. Proposer must affirm in writing that proposer can and will via telephone, internet, and through on-site modem, provide support services, from 8:00 a.m. to 5:00 p.m., Eastern Standard Time, Monday through Friday, excluding district twelve month employee paid holidays.
- 4) The vendor must provide a toll free telephone number that the district's administrative staff may use to contact the company during the recommended installation and implementation period. This toll free telephone number must be included as part of the initial proposal.
- 5) Proposers must provide the District with a recommendation to support a Customer Service connection between the hours of 8:00 AM-to-5:00 PM (Eastern Standard Time) with a maximum 1 hour response time once the implementation period is over. Should there be a

cost to support a customer service connection, it should be included as part of the annual license and maintenance fees in accordance with the signed contract.

- 6) Proposers must also include a contact for after-hours support service should there be a need. Proposer must include a cost for this service, if applicable.

References

- 1) The district is interested in working with a vendor that has sufficient experience, resources, and financial stability to accomplish the implementation with minimal disruption to current operations. All software proposed must be in actual daily use by customers. No software under beta testing will be accepted. The District intends to visit or telephone clients of each vendor to verify information offered in their proposal.
- 2) The vendor shall list a minimum of four **current software users**, including contact information, for the following:
 - a) Locations where the vendor's system is used for daily operations of a large transit or trucking organization that maintains at least 1000 vehicles (buses, trucks, or automobiles) daily, of which 50 must be buses. Include entity's name, address, contact name & phone number, size of account, brief description of services provided, and date and dollar amount of the agreement.
 - b) Locations where a school district has the vendor's system successfully installed on a WAN/LAN for at least 50 concurrent users that are in daily use. The system must allow for concurrent users, specifically, allowing for multiple users to access data in a specific area at the same time.

TERMS OF CONTRACT

The School Board, by Florida law, must reserve the right to cancel the contract in the event the services rendered do not comply with the provisions of the proposal and/or the quality of services is found undesirable. The proposer shall comply with all municipal, state, and federal statutes prohibiting discrimination. The proposer shall at all times comply with local, state, or national standards for the provision of services, whichever is more stringent. The Board shall have the right to cancel the agreement for unacceptable performance at any time, giving the other party sixty (60) days prior written notice.

No debriefing or discussion will be held with unsuccessful proposers. Upon official release of this RFP, no private communications with prospective proposers will be held with School Board members or staff in order to maintain a fair and impartial competitive process.

The District reserves the right to negotiate modification with any proposers as necessary to serve the best interest of the District. In addition, the District reserves the right to waive, at its discretion any procedural irregularity, immaterial defects or other improprieties, which the District deems reasonably correctable or otherwise not warranting rejection of the proposal.

The purpose of this competitive process is to select the best software solution available to automate the fleet maintenance program and add efficiencies in processing. Proposers must agree that there will be no discrimination as to sex, race, color, creed, or national origin in regard to its obligations, work and services performed under the terms of their proposal.

In formalizing this agreement, the School Board will reserve the right to restate and/or renegotiate with the selected proposer such pricing additions, deletions, changes, or clarifications of the provisions of this agreement as may be necessitated by law or circumstance.

EVALUATION OF PROPOSALS

Representatives of the District identified in this document will evaluate proposals in order to ascertain which proposal best meets the needs of the District. Evaluation considerations will include, but are not limited to the following:

Responsiveness of the proposal, clearly demonstrating an understanding of the services the software should provide:

- Compliance with all requirements and guidelines delineated in the RFP
- Expertise in Fleet Maintenance Management
- Financial viability
- Pricing structure and total cost to the district
- Technical support

To assist the selection committee, please ensure responses adequately address all questions and requirements. **All supporting documentation included for the response must be clearly cross-referenced to the relevant section, page and requirement, which it supports in the RFP. (See Attachment C)** If the proposer does not provide a requirement, the response should be identified as "Not Available." In order to assist the selection committee, the District reserves the right to short list proposals for purposes of demonstrations and final selection.

EVALUATION COMMITTEE

- Six representatives from the Department of Transportation (One non-voting)
- Two representatives from the Office of Information Technology Services
- A representative from the Office of School Operations, Access Center 6
- A representative from Vehicle Maintenance Division, Broward County Schools
- Two representatives from the Office of Internal Audits (Both Non-voting)
- A representative from the Div. of Procurement Management (Non-Voting)
- A representative from Business Development and Assistance

Committee members may be represented by other personnel as needed.

AFFIRMATIVE ACTION REQUIREMENTS AND M/WBE PARTICIPATION

Equal Employment Opportunity

It is the policy of the School Board that no person will be denied access, employment training, or promotion on the basis of gender, race, color, religion, ethnic, or national origin, political beliefs, marital status, age, sexual orientation, social and family background, linguistic preference, or disability, and that merit principles will be followed. Each proposer must submit its equal employment policy and provide a detailed breakdown by ethnicity, gender, and occupational categories of its work force. (See Attachment A)

Minority/Women Business Enterprise (M/WBE) Participation

The School Board of Miami-Dade County, Florida has an active Minority/Women Business Enterprise Program to affirmatively increase the level of Minority/Women Business Enterprise participation to the maximum percentage of total annual expenditures. In order to achieve its assistance levels, the Board provides the maximum opportunity for Minority/Women Business Enterprise participation.

In keeping with this policy, each proposer must state its Minority/Women Business Enterprise utilization. If a minority firm, which is woman-owned and operated, or African American owned and operated, is utilized in conjunction with the scope of work, the proposer is to indicate the scope of the women/minority proposer's work, experience in this type of required service, and experience of staff participating.

All Minority/Women firms must be certified by the Division of Business Development and Assistance, prior to contract award, see Attachment B.

M/WBE Documentation Requirements

A quarterly report documenting efforts undertaken by the proposer to maintain the stipulated M/WBE participation will be required. The report shall include the names of firms, contact persons and expenditures paid to date. The report shall be submitted to the Director, Division of Business Development and Assistance, 1450 N.E. 2nd Avenue, Room 456, Miami, Florida 33132.

INDEMNIFICATION

The successful proposer, when selected for this RFP, shall agree to provide proof of Professional Liability Insurance and to the following language:

The proposer shall hold harmless, indemnify and defend indemnities (as hereinafter defined) against any claim, action, loss, damage, injury, liability, but not by way of limitation, attorney's fees and court costs arising out of bodily injury to persons including death, or damage to tangible property arising out of or incidental to the performance of this Contract (including goods and services provided thereto) by or on behalf of the proposer, excluding only the sole negligence of culpability of the indemnity. The following shall be deemed to be indemnities: **The School Board of Miami-Dade County, Florida, and its members, officers and employees.**

PROOF OF INSURANCE COVERAGE REQUIREMENTS

At the time an award is made, the successful proposer shall be responsible for providing the School Board with the certificates of insurance which indicate that insurance coverage has been obtained and meets the requirements as outlined below:

- Workers' Compensation Insurance for all employees of the proposer as required pursuant to the provisions of Section 440, Florida Statutes.
- Commercial General Insurance on a comprehensive basis in an amount not less than \$300,000 combined single limit per occurrence. The School Board of Miami-Dade County, Florida, its employees and agents, must be listed as an additional insured on the policy.
- Automobile Liability Insurance covering all owned, non-owned, and hired vehicles used in connection with the work as outlined in this RFP, in an amount not less than \$300,000 combined single limit per occurrence for bodily injury and property damage liability.
- Proof of Professional Liability Insurance (e.g., medical malpractice) in the name of the proposer, with limits of liability not less than \$1,000,000 per wrongful act.
- All certificates of insurance submitted must be issued by companies authorized to conduct business under the laws of the State of Florida, with an A.M. Best rating (most currently published) must be no less than "B +" as to management, and no less than "Class V" as to financial strength.

- Certificates shall indicate no modification in insurance be made without thirty (30) days advanced written notice to the additional named insured or certificate holder.
- Florida Statute 237.201 relating to contractor-bonding requirements must be met, as well.

SOURCE CODE

Proposer shall keep and maintain current, at no additional cost to the District, a copy of the source code and related documentation in electronic form for the Software or Product in escrow. The Escrow Agent shall be authorized to release the source code to the District in the event that the Proposer has completely ceased all business activities for a period of 90 days or more and a third party has not agreed to assume responsibility. The District's use of the source code shall be limited to maintenance of the Software or Product for internal use during the term of the license. In this event, no change of ownership in the Software or Product shall occur. A fully executed source code escrow agreement, acceptable to the District and governed by and construed in accordance with the laws of the State of Florida, shall be provided prior to the commencement of the scope of work. The system will be housed and maintained at the DOT Administration Building. All data will be stored in servers at DOT.

IMPLEMENTATION SCHEDULE

The estimated schedule for selecting and awarding the project is as follows:

Mailing of Request for Proposals	October 24, 2003
Submission of Questions by Proposers	November 4, 2003
Distribution of Responses to Questions	November 7, 2003
Reponses to RFP Due to District (no later than 2:00 p.m. E.S.T.)	November 20, 2003
Evaluation of Proposals	December 1, 2003
Interviews/Demonstrations/Testing	*December 8, 2003
Recommendation to School Board for Award	TBA

Please note that an electronic version of the RFP is available upon request. Submission of questions by proposers may be done via e-mail and responses may be issued via e-mail.

- **NOTE:** December 9th, 2003 is also reserved depending upon the number of proposals selected for demonstrations.
- Please note that an electronic version of the RFP is also available on the district's web-site (www.dadeschools.net), as of the date of mailing. Submission of questions by proposers may be done via e-mail and responses may be issued via e-mail.

ADDITIONAL INFORMATION

The following individual should be contacted in writing for any additional information with respect to this Request for Proposals:

Ms. Barbara Jones, Director
 Division of Procurement Management
 Miami-Dade County Public Schools
 1450 N.E. 2nd Avenue, Room #356
 Miami, Florida 33132
 (305) 995-2348
 Email: bjones@sbab.dade.k12.fl.us

The District, in its discretion, reserves the right to notify all proposers of the results of any communication in which additional specifications or clarifications are discussed.

SCOPE OF WORK

The District is interested in purchasing a fully integratable Fleet Management software that allows the vehicle maintenance staff the ability to manage its fleet maintenance resources efficiently.

- Maintain a Total Fleet inventory with user definable specifications or fields such as unlimited vehicles and equipment, vehicle and equipment leasing, including private contracted bus services.
- Provide complete maintenance and repair histories for unit life cycle of service.
- Automatic Preventive Maintenance (PM) schedules.
- Repair work orders, track by Vehicle Maintenance Reporting Codes (VMRS)
- Multiple repair codes on single work order.
- Track maintenance by repair codes, assembly codes, and cost codes.
- Parts inventories management and processing by VMRS codes.
- Automatically track multiple warranties on equipment, by components, replacement parts, and multiple vendors.
- Automatically generate a universal bar coded warranty claim form that interfaces with work order module to avoid double billing of warranty claims to the vendor.
- Provide monthly report on warranty claim status.
- Customizable PM checklist based on vehicle classes.
- Parts, Tire and Component Costing transactions on real time.
- Unit maintenance cost per mile & per hour of operation.
- Work Pending Capabilities.
- Automatic meter updates for PM scheduling.
- Integration with other districts systems such as the automated fuel management system (E.J.Ward) and MSAF procurement program.
- Parts inventory tracking and purchasing automatically interface with work orders and purchase orders, requests, and procurement card purchases.
- Track all Procurement card purchases and charges to work orders, track all related warranty and provided usage reports by component similarities.
- Vendor performance tracking to include but not limited to comparative performance data.
- Track any fluid including fuel, oil, transmission fluid, coolant, power steering fluids and other lubricants.
- Fluid consumption reporting by individual item per mile and per hour of operation.
- Labor management to capture all labor transactions (direct and indirect) in real time. System must provide flexibility to modify labor time by system administrator, specific to user needs or equipment. Should be capable to interface with payroll or provide a stand-alone payroll module.
- Track location of vehicle or equipment by work location or department user.
- Management reports to include but not limited to cost analysis reports by month-to-date, year-to-date and life-to-date, assembly cost reporting, repair code cost reporting, mechanic productivity reporting, parts usage reporting, predictive maintenance reporting, repair work order reporting, department cost reporting, cost code reporting, location code reporting, labor cost analysis by in-house mechanics and outside vendors mechanics, and outside maintenance analysis.
- Life cycle cost analysis to establish vehicle replacement schedule.
- Capable of exporting data to other programs to create custom reports, capable of generating built-in reports and filtering data, capable of showing reports on screen or send them to a printer.
- Budgeting (Track monthly expenditures and revenue such as credits or warranty reimbursements). Software must provide the capability of using Standard Cost Jobs to

assist staff in estimating service cost, budget cost and expenditures and control cost relative to standards establish by the district staff.

- Forecasting expense and benchmarking capabilities with Regional and National fleet organizations such as The National Association of Fleet Administrators (NAFA) or The Transportation Research Board.

VEHICLE INVENTORY MANAGEMENT

- Life Cycle tracking of vehicles and equipment (from purchase to disposal) with 8 or more alphanumeric Vehicle number capability. To include year, make, model fields, Vehicle class(Light, Medium, Heavy-Duty, Trailer, Others, Vehicle registration, Vehicle serial number, Operator, Usage tracking option by miles, hours, kilometers, or fuel consumption.
- Multiple meters capability which enables the tracking of multiple alternate meters simultaneously. Software must provide System Administrator the capability of adjusting any or all meters in case one or all are damaged and replaced. As adjustments are made to meters, software should be able to recognize changes and adjust the scheduled maintenance accordingly.
- Software must be able to incorporate all vehicles whether owned, leased or contracted by the District. To include but not limited to the purchase date, in-service date, engine make, engine model, oil capacity, transmission make, model, and vehicle capacity. Tonnage, unit GVW, front axle, rear axle, tire size and rating, recommended psi, wheel base. Specifications on body make, model, and serial number. Software must allow for the input of information regarding vehicle data concerning the Line setting ticket, purchase price, current value, trade-in value, and depreciation per year etc. Data will be entered by DOT staff when vehicle is acquired in the system. Software should have the ability to import data via a scanning process and allow users to sort or research by each or a combination of the above mentioned categories.
- Software should be able to interface with the district's property control system for this process.
- Inspection scheduling with horizon capability for automatic generation and preprinting of work orders. Inspection Scheduling must allow for adjustment as DOT staff deems necessary.
- Depreciate vehicle and/or equipment through life-cycle.
- Automatic reference to previous charges to recognize specific parts usage such as, multiple component identification specific to vehicle and/or equipment, such as alternator make, model, amperage rating, brake system, steering, and starting system manufacturer. Engine and transmission oil filter numbers, tires. Fuel Tank capacity, vehicle consumption of fuel, miles per gallons, oils and lubricants.
- Assigned user defined fields with 15 or more alphanumeric capability.
- Automatic Preventive Maintenance (PM) schedules with 10 or more types of specific PM to each Vehicle, such as oil changes, trans. oil changes, coolant flushing, lubrication etc.
- Capable of importing information from the E.J.Ward Fuel Management System to schedule PM's By time, and/or miles, hours of operation, units and/or fuel gallons consumed.
- Ability to incorporate PM's part kits such as oil and fuel filters, belts, hoses etc.
- Ability to incorporate several PM's into one scheduled work order. Automatic postings of overdue PM's as new scheduled work order generates. Automatic warning of overdue Monthly Safety Inspection (MSI) per school year calendar.

- Software must provide System Administrator with the ability of linking school year calendar to MSI scheduling and allow user to operate under a traditional calendar for scheduling other vehicles not mandated for inspections by Florida Statutes.
- Software should provide user the capability of sorting all reports, such as overdue PM report, by vehicle number, vehicle assignment or location, and/or department user, date range, vehicle class, PM type or by factor (hours, miles, days, months, fuel consumption).
- Software should provide user with option of displaying reports or printing them by user defined criteria such as date range, class type or other user defined criteria. User should be capable of selecting to print one or all overdue PM's by type or schedule. Overdue PM reports can be selected by past due, now due, due within "X" number of days, and/or next "X" mileage, hours, or fuel consumption.
- Software must provide the capability of assigning unlimited pieces of auxiliary equipment to a vehicle such as radio, wheelchair lifts or gates, cranes, emergency equipment, Global Positioning Satellite Receiver (GPS) etc.
- Notepad or Notification advisories capability to pass on information or specific instructions to mechanic or supervisor.
- Capable of displaying entire vehicle/equipment Master File by vehicle number, Vehicle Identification Number (VIN), registration number, or license plate number.
- Ability to interchange vehicle assignment, usage, facility, department, number, location, at any given time. Vehicle historical data remains with vehicle or equipment regardless of changes.
- Software should be capable of providing data copying capability from one record to another as System Administrator determines.
- Software must provide a report, upon request of the System Administrator, of inactive or underutilize vehicle or equipment. This report should be allow to be sorted by vehicle number, location and/or department assignment, mileage and date since it was last used, and all expenditures related since then.

VEHICLE AND PARTS WARRANTY TRACKING

The software must have the capability of supporting a vehicle warranty tracking system to monitor and trace any claims on bumper-to-bumper warranty of multiple original equipment manufacturers (OEM), and component warranties.

- Warranty tracking must be conducted using Vehicle Maintenance Repair Standards codes (VMRS), for OEM extended warranties, and repairs or maintenance done by outsourced service providers.
- The Warranty Tracking of parts and equipment must be capable of monitoring the warranty from various Original Equipment Manufacturers (OEM) and/or vendors, suppliers, dealers, and aftermarket parts warehouses.
- Software must have the capability of tracking by miles, hours, and or time of warranties using multiple meters.
- Vehicle warranty must integrate with system's work order process to immediately "Flag" or notify user of a possible warranty claim.
- The software must generate a report, upon request of system administrator, of pending warranty claims or schedule. This will allow the District to take full advantage of any warranty schedule as it nears the expiration date of said schedule. This report will also identify possible maintenance or repair trends on new vehicles.

- The software must provide the capability of creating a traceable (Bar code or other) warranty claim notice or tag, so that this tag can then be affixed to the actual part, work order, and/or warrantable labor request.
- Software must have the capability to track warranty of parts and equipment regardless of purchasing procedure i.e. Purchase orders, Procurement Card purchases.

SYSTEM INTEGRATION

Software must be capable of integrating with various district systems such as the procurement management software, the Management Science American Finance (MSAF), the department's automated fuel management system (E.J.Ward), the general ledger, and property control etc.

- The software must be capable of handling future interface or expansions with other District systems should the District deems it necessary.
- The successful vendor must meet with District staff prior to full implementation to review system set-up, configuration and integration with other District systems.
- The system integration capability must be documented in writing by any software proposer.

LIFE-CYCLE COST REPORTING

Automatic Labor Tracking and Productivity reporting of all in-house maintenance and repairs.

- Vehicle inventory in various locations, with 4 or more alphanumeric department field, with Vehicle life cycle cost reports (Cost per mile, repair history, warranty history, depreciation) Fleet cost reports that Track shop labor hours of in-house, in-direct labor hours, and outsourced labor hours.
- Software must be able to sort repair and maintenance reports by department's owner or assignments, by vehicle, by repairs codes or systems classifications, by dates, by maintenance and non-maintenance transactions or activities, and by work orders regardless of their status.
- The life-cycle cost report must include all parts (warranted or expensed), labor (In-house or outsourced), cost-per-mile per individual repair system classification for year-to-date, life-to-date, and current period.
- Cost-per-mile must also include individual tires expenditures, regular maintenance activities, recalls, warranties, fuel and all lubricants consumption.
- The software must have the capability to sort by vehicle class or grouping in order to afford DOT staff the capability of recognizing repair or maintenance trends by type of vehicle or user.
- Cost-per-mile must consider miles driven, lubricants and fuel consumption, tire usage, labor, breakdowns etc.

WORK ORDERS

The Software must use Vehicle Maintenance Reporting Codes (VMRS) formatted to specific labor codes and must allow the system administrator the capability to create or modify user defined labor codes that are specific to the District's needs.

- Software should have the capability of defining difficulty factors that allow the user to designate up to 5 different time estimates for a single labor code depending on how difficult a task is on a specific vehicle or vehicle class.

- Capable of processing work orders in both real time or batch mode, use multiple digit levels of VMRS codes such as 3,6,and 9 digit levels, access to all jobs history displayed when creating a work order, including overdue PM's or any pending repairs.
- Capable of incorporating an automated "Paperless" Shop option if the District's so desires to expand software capabilities at a later time. "Paperless" Shop option must be in real-time mode capable of handling multiple shop floors.
- The software must provide DOT staff access to vehicle master file while creating or processing a work order. The work order master file will display all job related history when creating or processing a work order. Any overdue PM's must be displayed while a work order is being created or processed so at the discretion of DOT staff, the overdue PMs can then be imported or attached to the newly created work order.
- The work order module of the software must provide look-up screens to various categories within the work orders, such as VMRS codes, vehicle numbers, customers or departments, vendors, mechanics, parts, warranty claims, and outsourced maintenance repairs.
- Any and all work orders must track outsource repairs including vendor, purchase order number(s), procurement card transactions, outside parts and labor costs.
- Procurement card transactions must be captured on work orders, identifying all individual purchases in detail.
- The software should allow for the creation of a template or standard job work orders in order to group all similar vehicles using the same work order format or events.
- Work order priority code must be capable of handling 10 or more user defined codes. Work order reason codes will allow for 100 or more user defined reasons.
- The software should provide the capability to incorporate accomplished labor codes, cause codes, description codes, indirect labor codes, and specific shop codes. Staff must be capable of editing or deleting codes once they are entered.
- The software must allow staff to make any necessary changes to work orders. Work orders must be able to handle 100 or more repair lines with up to 5 lines (with 300 characters per each work order line event).
- When closing a work order, the software must allow for a comment area of up to 3 lines (with 180 characters) per line.
- The work order module must fully integrate with the parts inventory management component of the software to automatically charge a part to the specific work order and deplete the inventory.
- Automatically trace all parts and labor credits generated by warranty claims or adjustments.
- All work order must have the capability of entering a real-time odometer or capturing the most recent odometer via the interface with the fuel management program.
- The work order section of the software must provide a scheduled and overdue PM report with capability of sorting by shop code, vehicle number, department, generation date, number of jobs scheduled, number of jobs completed, and number of hours scheduled.
- The software should provide the option to print, sort, capture work orders by numbers, date, departments, and select from both open and closed work orders.

PARTS INVENTORY MANAGEMENT

Parts inventory management must include purchasing of all transactions via procurement card or purchase order.

- Software must be fully integrated with the work order section and capabilities of tracing all inventory and non-inventory parts. Automated warranty tracking of multiple vendors, parts inventory lists by part number, vendors, parts name and description, cross reference part numbers, parts management reports, vendor information, non-stock parts.
- Capable of handling 15 or more alpha-numeric part number with up to 10 vendors for each part or component with related cross-reference numbers, manufacturer, and last purchase price. The parts inventory should be capable of calculating average price costing method. Once the part has been charged to the work order the price for the part should then be locked in at the last average price.
- The software must provide for 8 or more alpha-numeric bin locations for parts storage arrangement and capable of printing bar coded tags to identify bin locations.
- The parts module should be capable of assigning up to 8; 4 character fit codes for each part. This will enable the DOT to print or view a list of parts that fit or that can be used on a particular vehicle or group of similar vehicles.
- The software must be capable of tracking accumulated parts usage per period and year to date. DOT must have the ability to establish reorder points and quantities on a part by part basis.
- The software should provide capability for 8 or more price/stocking levels to define maximum quantities of parts in inventory. This information will assist DOT in determining its reorder levels, and make the necessary adjustments.
- The system must also track and display parts currently on order/back order, and last invoice number and date. The program must be able to determine and identify via a flag or other notification that a particular part is either a stock or a non-stock part. The program must track the usage of non-stock parts in order to allow DOT the ability to determine whether the part should be stocked or purchased "Just-in-Time".
- The parts inventory management module must be capable of tracking multiple part categories such as parts, oil, tires, antifreeze, lubricants, fuel etc. The part warranties must be tracked by miles/hours, months and/or years.
- The system must be capable of tracking and generating component failure statistics by miles/hours, months, and/or years.
- The system should have the capability of incorporating new technology such as bar-coding or other data collection programs to assist in the data collection process. The data, once collected, should allow DOT staff the ability to download the data into a parts inventory report to compare to on-hand quantities and adjust simultaneously with a printed report of changes. In addition, the software should be able to read vendor barcodes and interface with OEM and other after market parts suppliers.
- The parts inventory module must interface with the work order module in order to allow for crediting or adjustments to work orders and inventory levels upon parts being return to inventory regardless of purchasing method i.e. Procurement card, purchase orders.
- The parts module must allow DOT staff the ability to print distribution list by bin location, all parts (stocked and non-stocked), with or without bar codes, including committed purchases such as back orders and on-order purchases.
- The software must be capable of generating parts management reports (for display or printing) that show low usage of parts for the last 13 consecutive periods of use, general usage report by vendor or part number, quantities used per part, per period., inventory balance reports by accounting structures, inventory adjustment reports, purchase order

transaction reports by part number and/or date, parts usage by work order, part failure analysis, and warranty reporting by part number or vehicle number.

- The purchase order transaction report must be detailed, but not limited to, include part number, purchase date, part description, vendor; quantity purchased, purchase order number, part cost, and extended totals.
- The parts usage by work order report must identify parts expenditures by individual part number for a single part or multiple parts, by repair order number, vehicle number, repair code, transaction or activity date, quantity, price per part, and total expenses to a work order.
- The part failure analysis report must recognize the periods or interval a part fails during the traceable warranty period, whether it is being tracked by miles, hours, months and/or years, for year-to-date, life-to-date or specific period -to-date.
- Vendor information must be identified by a user defined vendor number (with 10 or more numeric digits), vendor name or abbreviation (with 14 or more alpha digits), contact name, address, City, State, Zip, phone number, terms, payment due dates, discount due dates and percentages, delivery mode and time, tax ID # or any other information regarding vendor.
- The software must track all transaction with each specific vendor, to include but limited to, last purchase date, total PO's, PO budget, PO budget used, PO running balance, blanket PO or any extensions, blanket PO expiration date, an area for comments to allow for up to 99 different entries for DOT staff to allow for DOT staff to evaluate vendor performance.

TIRE MANAGEMENT AND REPORTING MODULE

- The tire management module must track each tire owned or leased by the District by tire number, vehicle mounted on, position on vehicle, number of times recapped, manufacturer, capper number, size, type, load range, purchase price, casing value, current value, mounted mileage, date mounted on vehicle, tire life miles, tread depth, months in use, runoff percentage, cost per mile (CPM), average miles per 32nd, projected total mileage.
- This information should be available via performance reports sorted by manufactures and recappers. These tire reports should evaluate the existing data in order to project or forecast the number of tires due to fail over a specific time period based on tire mileage and wear characteristics etc. Additionally, a tire life transaction report and a tire casing value calculator based on data collected once tire has been deemed surplus is preferred.
- Software should track revenue or credit generated by scrapped tires.
- The tire management program must be able to track all warranties claimed by manufacturers and revenue or credit achieved via a warranty claim. A report should be available to be viewed or printed to track all transactions by period-to-date, month-to-date, year-to-date, pending claims etc.
- The software should provide manufacturer and recappers cost and performance reports, by tire size, load range, tread type etc.
- Software must track all tire transaction and report by failure codes or causes to allow DOT staff the ability of recognizing failure trends or identifying areas for improvements.

FUEL MANAGEMENT MODULE INTERFACE

The software must be capable of interfacing electronically with the District's fuel management system, E.J.Ward, and expense all fuel transactions to each District owned vehicle.

- All transactions must be tracked by miles, hours, gallons, date, and usage from last fuel transaction, oil or other lubricant usage.
- Capable of automatically updating odometer readings in order to adjust PM schedules per vehicle.
- This module must be capable of generating an odometer exception report after it has recognized an error related to the odometer. In addition, this module must generate an average monthly vehicle and/or equipment usage report, to allow DOT staff the ability of evaluating its vehicle/equipment utilization rate. This report must be made available by user requirements whether in display or print, format itemizing the average miles/hours by each vehicle or piece of equipment.

FINANCIAL MANAGEMENT MODULE INTERFACE

The financial management module of the program must be capable of interfacing with the District's current financial program which is the Management Science American Finance (MSAF). The software provider must be capable of incorporating modifications to the existing financial program or upgrade to a new financial program should the district decide to procure one.

- This module must be capable of generating automatic parts requisitioning when inventory falls below reorder point. The District must have the option between min/max method or reorder quantity method for restocking inventory.
- The software must allow for changes to parts on requisition of vendors, adjustments in price and/or quantities.
- Purchase order should generate automatically or initiated by system administrator, from edited or non-edited requisitions for all vendors or by a specific vendor. The module must allow for the creation of Blanket purchase orders with up to 999 extensions, funding structure, and budget used, running balance, current extension, first extension, purchase order start and expiration dates, prior blanket purchase order for vendor.
- Capable of tracing all transactions through the procurement card process including stock and non-stock. The module must allow DOT staff to expense procurement card transactions by line item to work order and monitor for warranty adjustment or claims.
- The system must provide the capability of tracking warranty claims for all vendors or by a specific vendor, even if the purchase was conducted by Procurement card method.
- The module should be able to generate a Procurement card purchase report by vendors and track the revenue generated by the Procurement card reimbursement agreement with the Procurement card provider.
- The software must trace all Procurement card purchase and identify a recurring part purchase to determine if the part or parts should be stocked instead of purchased as needed. This module should allow for the ability to add a part record to a purchase order, receive purchase order quantities on a line-by-line basis or in total. Additionally, posting of back orders on partially received purchase orders.
- The system should be able to recognize automatically if a price is different from the order price. As a result, an exception report should notify the user of such change in price.
- A purchase order summary report must be available by purchase order or by vendor. The report must list purchase order number, generation date, received date, shipping date and time, vendor number and name or abbreviation, purchase order cost, and status.

SHOP MANAGEMENT MODULE

The shop management module must provide real-time monitoring of all activities and personnel assigned to a specific workstation or location.

- This module must be capable of tracking all work-pending repair or maintenance orders, emergency work, and scheduled work orders in real-time to include but not limited to indirect labor and support staff assignments. Additionally, this module must be capable of importing and/or exporting data from all the other modules mentioned in this RFP.
- The shop management section must identify by user defined criteria, “who is doing what, and when they are doing it” in each individual or specific work location. The software must provide the capability of having each individual employee clock in-and-out of assigned job duties or tasks. Must allow for an unlimited number of assignments to each employee.
- The software must calculate the actual time spent on each assigned job and track the individual productivity of each employee. A user defined productivity report must then automatically generate by work location to identify the planned versus actual time spent on each job or task.
- The software must allow DOT management to add, delete, and/or reprioritize jobs to employees throughout the workday that are assigned to a specific location or site.
- This component of the system should allow for future expansion or modifications of Standard Operating Procedures (SOP) such as allowing for mechanics and/or other personnel to charge parts or services to work orders directly.
- This component of the system should allow the capability of incorporating other systems or technology such as a “Paperless Shop”, biometrics, time and attendance, and Global Positioning Satellite (GPS) components.

MANAGEMENT REPORT MODULE

- The management report module should provide DOT staff with the ability to customize reports. Basic arithmetic instructions that allow the user the ability to control or change numbers as needed. This module should allow for the ability of creating or requesting command formulas for a specific report. As a result, totals are automatically performed by minimums, maximums, averages, and sums of columns of figures.
- The software should have advanced logistical capabilities to provide information of complex logistical issues. The logistical capability should allow for the user to command as needed, the ability to isolate, ignore, start, stop, and target specific portions of large or complex files.
- The software should provide the ability to sort as needed the data in any order, any field, or a combination thereof. DOT must be able to control every data line, so that the user can adapt or modify to exact arrangements required. The user should be able to control subtotals and/or totals should the format so requires.
- The system should provide for the capability of supporting up to nine different levels of subtotals, all calculated automatically, unless the user chooses to omit.
- System perpetual data, such as date, time, page, record counter, etc. must be available for inclusion in reports if the user so requires it. The report itself should be available for display and/or printing.
- The software should provide the user with the capability of exporting into other software such as Excel, Access for presentation purposes. Any produced report may be directed to interim or temporary files for later or succeeding reporting. The software must allow DOT

the ability to scroll through (Up or down, forward or backward, side to side) reports to find specific areas within the report.

SYSTEM REQUIREMENTS

A. DATA

- 1) The ability to easily import and export data using the proposed software system is critical. The district requires an application that can take feeds from many internal and external sources. The proposed software must be able to import and export a variety of fleet maintenance information, such as new or improved repair techniques.
 - a) System Parameters (Capable of defining up to 999 different facilities/locations and or companies, each with separate parts inventories, mechanics, and cost reports.
 - b) Allow for the setup of different or specific private service providers markup or discounts on parts and labor.
 - c) Provide the capability of handling Work Order Reason Codes (Allow the DOT the ability to track and sort the reason why a work order was opened; up to 99 codes).
 - d) Scalable to 10,000 pieces of equipment.
 - e) Capability to incorporate wireless application
- 2) Please describe in detail how your system handles the following items that must be handled through manual data entry and/or via a data import and/or export process. Describe the file types that can be imported and exported (e.g., excel, word, jpg, gif, HTML, etc). Include security procedures, scheduling procedures, tools/controls that are used to ensure the completeness and accuracy of the information being provided e.g., the success and completeness of imported/exported files and any other features or limitations:
 - a) Asset Management Data (Vehicle, equipment, parts, labor among other resources)
 - b) Fleet Management Data
 - c) Procurement Data
- 3) Information about our fleet of vehicles
 - a) Vehicle number (capable of handling up to 10 alpha-numeric digits)
 - b) Vehicle year, make and model
 - c) Vehicle classification(Class type or user defined)
 - d) Vehicle equipment or hardware such as, but not limited to:
 1. Wheelchairs lifts and hook-ups stations
 2. Seating capacities including Car seats or Child restraint seats
 3. Safety harness
 4. Air-conditioned
 5. Air-ride suspension
 6. Cranes
 7. Lift-gates
- 4) Location designation or assignment (up to 20 digits Alphanumeric)
- 5) VIN (Vehicle Identification Numbers with up to 20 digits Alphanumeric)
- 6) Information about our employees from an internal feed
 - a) Employee number
 - b) Employee name
 - c) Work schedule
 - d) Certifications
- 7) Please describe in detail how your system handles backup and recovery procedures.

B. PROCESSING

Please describe in detail how the proposed system meets the following desired functionality:

- 1) Access security based on roles within each software package/module/screen. The available system should allow for the definition/designation of authorized personnel for specific tasks that can only be modified by an authorized system administrator. Audits trail of the users entries should be maintained in the system and are reportable to the District. Does the system support multiple levels of review and approval? Describe all available processes.
- 2) The system must operate each type of software from the system's main database, using Microsoft SQL, thereby eliminating the need to enter or copy data files to each server or PC. The system must operate in a true client-server mode, and in the windows environment to be compatible with existing systems. The District may have as many as 100 users online accessing the system at any one time, and the vendor must provide software that can accommodate that many users concurrently with proper access rights to perform their specific jobs. In addition, the software must have the ability to accommodate additional users in the future. The software must have the ability to upload and download data files and the vendor will be required to assist the District in implementing the necessary file exchanges.

C. PROCUREMENT & BUDGET FORECAST

One of the most important tasks DOT conducts is the budget forecast for the following fiscal year. The system should have the ability to assist in the planning for the most efficient budget, based on previous year's use of available resources. This functionality will be reviewed closely during the vendor demonstration, as well as comments from vendor clients and site visits. DOT wants the ability to analyze the data in preparing the vehicle maintenance budget and capital funding for future school bus and other support equipment purchases, as well as the need for staffing allocations.

D. INFORMATION REPORTING

- 1) Please describe your reporting/inquiry capabilities and provide sample reports (ensure samples describe what information is shown).
 - a) Describe in detail the functionality for ad-hoc reporting. Can the user specify the selection, filtering and sorting of fields?
 - b) Does the system offer the ability to inquire about specific transportation maintenance activities?
 - c) How many days/years of history can be accessed through the system?
 - d) What other reporting services or features are available through the system?
- 2) Describe how information can be exported.
 - a) Can macros be created to export specific information on a daily basis?
 - b) Can the export be done on a time sensitive schedule?
 - c) Can the macro also include commands to encrypt the data?
 - d) Describe all security features related to the exporting of transportation reporting system.
- 3) The District will require the selected vendor to develop fifteen (15) custom reports during the first two years after initial installation of the software. Such reports may include, but are not limited to:
 - a) Cost-per-mile
 - b) Productivity reports by shop and individual employees
 - c) Direct versus in-direct labor hours
 - d) On-time performance of maintenance and repairs functions
 - e) Percent of P/M inspections completed on-time
 - f) Miles/days between in-service breakdowns
 - g) Cost per bus for maintenance labor, parts, and fuel
 - h) Percentage of maintenance repairs vs. non-maintenance functions (i.e. capital)
 - i) Percentage of support cost (overhead)

- j) Cost per mile breakdown by maintenance jobs
- 4) Please describe what is available from the vendor regarding manuals and other items for assistance. The selected vendor will provide ten complete sets of operation/reference manuals along with on-line/CD versions of the same.
- 5) Are there any batch functions? If so, how are they executed and what level or category of staff will be required.

E. WEB-BASED ACCESS

- 1) Provide a detailed description of all services that can be provided via web-based access.
- 2) Describe in detail all security issues/controls related to the Web-based applications.
 - a) Encryption of data or database
 - b) User Profiles
 - c) User ID's and passwords
 - d) Timeout, including during mid-execution of a transaction
 - e) Firewalls and network security
 - f) Security Administration
 - g) Audit logs
- 3) The system must have security to prevent unauthorized access to protected data.

F. TECHNICAL CAPABILITIES

F1. Software Maintenance/Enhancement Product

- 1) How long has the current release of the proposed software system(s) been available?
- 2) How often does your company issue new releases (version and maintenance) and how many versions or releases of the proposed system(s) software do you support?
- 3) How customers are notified of version upgrades and maintenance releases?
- 4) Are customers involved in testing any new releases or upgrades?
- 5) How many of your customers are currently involved in testing any new releases or upgrades?
- 6) What is the expected end-of-life for this software?

F2. Experience & Commitment to Product

- 1) What differentiates your software from that of other vendors? Are you willing to guarantee both the timeliness and quality of your customer support?
- 2) How do you plan to keep your software current/competitive, and what is your commitment to providing on-going enhancements?
- 3) What is the size and makeup of the existing customer base actively utilizing your software?
- 4) An affirmation in writing that the vendor can and will via telephone, internet, and/or through on site modem, provide support services, from 8:00 a.m. to 5:00 p.m., Eastern Standard Time, Monday through Friday, (excluding district twelve month employee paid holidays) during the suggested implementation period.

F3. Interfaces

The Interfaces to and from our Procurement and General Ledger systems use a specific record format and layout for each type of transaction. These layouts are fixed format and the vendor must have the ability to provide the interface in the required format. These transactions have certain fields populated with codes that allow the General Ledger and Procurement systems to interpret the transaction.

Following are examples of the transactions we interface:

- Transactions to the general ledger that reflect the variety of standard adjustments to stock.

- Transactions that reflect procurement activity, for example requests for stock, requisition changes, PO creation, PO changes and receipt of stock. These transactions are populated with a variety of codes to identify the type of request
- Fuel usage transactions charging the location that uses the fuel.
- Transactions to the general ledger that reflect the cost of maintenance.

The District utilizes in-house Procurement software. The system resides in an IBM 9672-R36, MVS, mainframe computer, which supports LU, LU.6.2 and TCP/IP protocols.

Network Environments:

Microsoft Windows 2000
 Microsoft Active Directory Services
 Microsoft SQL Server
 Microsoft Internet Information Services 4.0 and 5.0
 Microsoft Application Center
 Microsoft Cluster Services
 Cisco Hardware and Software
 HP OPENVIEW
 Microsoft Exchange 2000
 COMPAQ Servers
 Crystal Reports

The proposed software solution must provide the necessary functionality and integration to have a successful interface with the District's existing management information system. Additionally, are there any batch functions? If so, how are they executed and what type staff will be required to support those functions.

F4. General Compatibility

- 1) System must be capable of downloading or feeding information into Excel spreadsheets or Word for further data manipulation and reporting. Describe any other import/export formats supported.
- 2) Can the user build and execute macros and forecasts? If so, describe process and formats supported? Will transactions input via these screens be recorded in the audit trail file?
- 3) Does the software provide e-mail communication and messaging for customers of the DOT? Can the e-mails be encrypted automatically using a secure stored encryption key? Does the system include e-mail capabilities or is additional server and client software required (i.e. Exchange and Outlook)? Describe in detail all aspects of the e-mail process including system hardware and software specifications, and configuration options.
- 4) The systems must be compatible with Windows XP, 98, 2000, NT, and SQL server environments. Describe in detail the recommended hardware and software configuration required for a secure, reliable, and responsive system. Include recommendations for both the client workstations and the server. Also indicate the circumstances or limitations that would require additional hardware, software or other configuration changes.

F5. Hardware/Software Configurations

- 1) Provide a schedule that delineates each of the following specifications for the available systems:
 - a) Describe network protocols requirements
 - b) Describe modem requirements
 - c) Describe data transfers requirements
 - d) Describe type of CPU, hard drive and memory resources required on both the client and server
 - e) Describe database structure requirements. Can it support a centralized database?

- f) Describe bandwidth requirement
 - g) Provide the name of the operating system platform, database structure, and software language used.
 - h) Describe any special printers/plotters needed.
- 2) What limitations exist regarding the number of records in the database? Also, explain historical records archival, retrieval and purging processes.
 - 3) The system must be configured for client/server environment such as Local Area Networks (LAN's) and/or the District Intranet.

F6. Customization

- 1) Describe to what extent the end user may customize the systems and how access to customizations can be limited. Will customizations be covered by the product warranty?
- 2) Can the user design customize input screens for data input and/or add/delete customized fields? If yes, describe in detail the process. Will transactions input via these screens be recorded in the audit trail? Can access to the customization functionality be controlled at the module level or for the total system? If so, describe in detail.

F7. Disaster Recovery/Back-up Plan

- 1) Describe the back-up plan for the proposed system(s).
- 2) For each service delineated in the RFP, provide time limit and method for providing old files/information.

F8. Documentation

- 1) Describe the format, contents and quantity of system and user documentation that will be included with the systems. Is there a fee for additional copies of documentation or can it be copied?
- 2) Will documentation updates be provided when new releases or versions are installed?

F9. Security

- 1) The system security architecture should allow for the designation of a security administrator. Security for each module should be hierarchical and allow for the assignment of granular access to users for individual screens, reports, and data elements.
- 2) Describe how system, individual program, and user passwords are handled.
- 3) Describe the User ID and password functionality. Can it adhere to the following guidelines:
 - a) User ID will be revoked when an incorrect password has been entered 3 times in a row within a 30-minute period.
 - b) User ID may be revoked, cancelled, or suspended at any time.
 - c) Password must be changed every 90 days, unless the user has access to certain types of sensitive data as determined by senior staff, in which case the password must be changed every 30 days. Notification of an impending password change deadline will be provided whenever possible.
 - d) Users are restricted from reusing their last 6 passwords.
 - e) Users may change their password at any time.
- 4) Audit trails and logs are required to show what functions have been performed and by whom. These audit trails should be able to identify the originating module in addition to the originating user for each transaction. System generated transactions should also be included in the audit trail.
- 5) There should be provisions for the system to handle security measures user ID's and passwords. Access to these user ID's and passwords should be restricted. All user ID's and passwords should be encrypted while stored and in transit to prevent unauthorized access.

- 6) Can a user be prevented from seeing those functions on the menus, which that user is not authorized to perform?
- 7) If the system (hardware or software component) needs to be serviced, what security measures are in place to safeguard the veracity of our data?
- 8) Describe any additional or optional security features available.
- 9) Are there timeouts built in to the application screens with user defined times and passwords?
- 10) Will the vendor require access to the system through the Miami-Dade County Public Schools (MDCPS) firewall and if so, is a VPN and/or encryption provided? If this access is required, would it include use of remote administration software, such as PC Anywhere, and why? The vendor is hereby notified that any breach of MDCPS computer assets by the vendor's staff, including unauthorized system use and data access, is a violation of MDCPS Network Security Policy and could result in legal action.
- 11) All Intranet applications at Miami-Dade County Public Schools are accessed via a security front-end system based upon RACF authorization and authentication. Additionally, application web pages contain re-directs to prevent bypass of this security system. If the proposed application is web based and intended to deploy on the Intranet, the following design criteria must be met.
 - a) Application must be designed to run on load balanced web servers under Windows 2000 Advanced Server with IIS 5.0.
 - b) Application must utilize Microsoft SQL Server 2000 as the database management system.
 - c) Web pages must use Active Server Pages (ASP) capable of accepting **include** statements.
 - d) Application must contain a web page capable of receiving a form posted to it from our security system.
- 12) Upon entering into contract, the Office of Information Technology will provide detailed instructions and sample code.

F10. Implementation

- 1) The vendor must specify the number of days for training in their proposal. This training must occur at the district, and must be conducted with district the most current district data installed on the proposed software system.
- 2) Provide a brief description of the installation and implementation process.
- 3) Provide a detailed implementation schedule, including:
 - a) Timeline
 - b) Task list
 - c) Task due dates
 - d) Assigned responsibilities
 - e) Contingent events
 - f) Resource requirements (District & proposer)
 - g) Information requirements
- 4) Provide an acceptance test plan that includes the most specific means for validating the successful implementation plan and on-going monthly performance in accordance with the requirements of this RFP.
- 5) Describe the type of support provided during implementation, including associated costs and additional implementation services, if any. Include an estimate for implementation assistance and any associated costs or expenses, including travel that may be required.
- 6) Describe the process to convert historical data currently available and maintained by the District.
- 7) Describe the initial and on-going training for upgrades and enhancements provided, and the associated cost.

- 8) On an average, how long has it taken your customers to fully implement the software services for institutions the size and complexity of the District? Do you have any customers that have not been able to interface with your systems? If so, describe in detail each situation.
- 9) In addition to the training during the installation of software modules, the vendor shall be required to assist the district with the first full implementation of the fleet management software. The vendor is required to detail what services will be provided and include the cost for those services in their proposal. The intent is to ensure the district successfully uses and implements this type of software.
- 10) The vendor will provide a tutorial program with electronic and manual documentation to the district, and the vendor's telephone support center shall be available as detailed above for assistance with the tutorial programs.

G. CUSTOMER SERVICE & QUALITY

- 1) Organizational Chart with the positions listed, including the job descriptions and qualifications of the vendor's key technology and administrative staff that support the products being recommended for use by the district.
- 2) Describe your company's customer service organization structure, including location of customer support offices and how many employees are devoted to support the District.
- 3) Describe the customer support for future system updates, enhancements and new versions of the software.
- 4) Describe the available technical customer support for computer hardware, software, and communication problems, and problem escalation procedures.
- 5) What is your historical response time? Describe the remote and on-site diagnostic support provided.

H. ON SITE SOFTWARE DEMONSTRATION

- 1) Vendors selected for demonstration will be required to participate in an on-site performance presentation of their software at the vendor's expense. The intent of this presentation will be to ensure all vendors' software meets the RFP specifications.
- 2) The vendor will be required to demonstrate the web browser software from an existing client and certain functions within the software, but not limited to the items below:
 - (a) **VEHICLE ENTRY:** Prepare for a demonstration a new vehicle acquisition entry into the program. Show the newly acquired vehicle as part of the Vehicle Master File. Display ability to add or change user definable fields. The ability to program or schedule the new vehicle into the Preventive Maintenance (P/M) schedule. Display the ability of incorporating different schedules for different vehicles types. Prepare and assign a P/M standard job or template format to assign a particular group or type of vehicles.
 - (b) **WORK ORDER(S):** Demonstrate the ability to enter new job tasks or events or delete jobs from a new work order. The ability to import pending work or task from previous work order(s). The ability to display multiple tasks or jobs on a single work order. Display P/M Cost breakdown per work order and date range, display Repair Type Code report, and list of reason codes. Display work order(S) by customer, account or charge code, facility, by period-to-date, year-to-date, and life-to-date, and maintenance and non-maintenance transactions at the job or task level.

- (c) **VEHICLE HISTORY:** Display of historical data pertaining to a specific vehicle during work order creation process. Display Vehicle fixed cost, operating cost, cost-per-mile/kilometer, history summary, detailed transaction history, and all OEM warranty transactions up to that point.
- (d) **OVERDUE P/M:** Display or print, an overdue P/M inspection report with user define fields such as date range, facility, department, overdue jobs, P/M type, interval, last P/M, next due, mileage, hours, fuel consumption, service notes or remarks, vehicle class or type, brief description etc.
- (e) **PARTS INVENTORY AND ISSUE:** Display the ability to charge out parts and/or service, both in-house and outsourced. Ability to show on screen previous charges to vehicle within a specific date range. Ability to generate a purchase order and display a PO transaction report. Ability to generate a parts inventory report by location, value, and on-hand, back orders, low-usage, vendors, fit codes, cross-reference numbers, bin locations, descriptions and non-stock. Display low-usage on a particular part, adjustments, activity, gains/losses/damages, and warranties. Execute a complete Procurement card transaction from the moment of request to payment. Display step-by-step procedures of this function.
- (f) **WARRANTY MONITORING AND REPORTS:** A Vehicle warranty must "Flag" or notify user of a possible warranty claim. The software must generate a report, upon request of system administrator, of pending warranty claims or schedule. This will allow the District to take full advantage of any warranty schedule as it nears the expiration date of said schedule. This report will also identify possible maintenance or repair trends on new vehicles. The software must provide the capability of creating a traceable (Bar code or other) warranty claim notice or tag, so that this tag can then be affixed to the actual part, work order, and/or warrantable labor request.
- (g) **MANAGEMENT REPORTS:** Ability to display or print multiple report listings, employee productivity, indirect labor hours, fuel transactions, parts usage, parts activity, parts warranty, satisfied warranty claim, pending warranty claims, parts failure reports, failure statistics by parts or components, tire history, tire transaction, by manufacturer or recapper, tire scrap report, work order schedule report, open work order event line report, cost-per-mile, repair type code report, cost breakdown by system code report, accounting reports, by departments, date range, facility, and other typical transportation reports such as maintenance and non-maintenance expenditures report.
- (h) **TIRE TRACKING:** Display how tire tracking module is going to function. Suggested items to demonstrate are tire listing, by inventory number, manufacturer, rating, size. Display tire history, tire usage by transaction type, cost by manufacturer or/and recapper, revenue generated by scrap tire.
- (i) **INTERFACE PLAN:** Exhibit proposed plan to interface with other District software or systems.

I. PRICING

Proposers must provide a detailed pricing summary to include all implementation costs related to software, training, programming, interfacing with other district owned systems, license fees (if applicable), annual enhancements and/or maintenance agreements, (if any), data conversion costs, or any additional pricing considerations associated with the software. Provide a detailed summary of maintenance cost for the first year of operation. Provide a projected summary of maintenance cost for years 2-5 of operation. All pricing must be presented in U.S. Dollars.

J. PAYMENT TERMS

The District reserves the right to negotiate payment agreement. Such agreement will include payment in incremental portions as phases of the project are completed. Proposers should detail a payment schedule and associated deliverables. Negotiations will be conducted with the selected vendor once this project is awarded.

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3. **CERTIFICATIONS:** Indicate if this business shares common officers, owners, directors or management personnel with another business that has received, been denied, or had its certification revoked as an MBE/DBE/WBE or SBA 8(a) Certified Contractor. Indicate the name of the certifying authority, as well as the date and type of determination (certification/denial/revocation).

<u>Agency Name</u>	<u>Determination</u>	<u>Date</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____

4. **OWNERSHIP:**

- a. Identify the proprietor, each partner, or stockholder by name, as well as his/her citizenship (c) or (r) residency status, gender, ethnic group, and percentage of ownership.

<u>Name</u>	<u>Owner/ shareholder</u>	<u>Resident or *U.S. Citizen</u>	<u>Gender</u>	<u>Ethnicity</u>	<u>% Owned</u>	<u>Years Owned</u>
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____

- b. If the business is a corporation, please indicate the following:

1. The number of shares authorized: _____
2. The number shares issued: _____
3. Are there any stock option agreements? Yes _____ No _____
If yes, please provide a copy of each agreement.

5. **OPERATIONAL CONTROL:** Provide the name, title, race/ethnicity, and gender of each individual (including owners and non-owners) with the primary responsibility for the following:

	<u>Name and title</u>	<u>Race/ethnicity/ gender</u>
a. Check signing	_____	_____
	_____	_____

	<u>Name and title</u>	<u>Race/ethnicity/ gender</u>
b. Payroll signing		
c. Signing, or guaranteeing loans		
d. Acquiring lines of credit		
e. Acquiring surety bonding and insurance		
f. Purchasing major equipment/services		
g. Signing contracts/change orders/payment requisitions		
h. Estimating		
i. Qualifying the company for professional/trade license(s)		
j. Marketing/sales		
k. Hiring and firing managerial employees		
l. Hiring and firing non-management employees		
m. Supervising field/ operations		
n. Supervising office personnel		

6. **PERSONNEL:** Identify the number of individuals, including owners, that are currently employed by the business in the following areas:

Please use the following to classify women/minority persons: AM-African American male, AF-African American female, HM-Hispanic male, HF-Hispanic female, WM-Non Hispanic White male, WF-Non Hispanic White female.

Total Number
of Employees

AM	AF	HM	HF	WM	WF

- a. Management _____
- b. Administrative/clerical _____
- c. Professional/technical _____
- d. Craftsperson/laborers _____
- e. Provide a copy of the business affirmative action statement, if one is available.

7. **BUSINESS RELATIONSHIPS:** Provide the requested information for each of the following:

- a. Bonding Company: _____
- Address: _____
- Agent name: _____ Phone number: _____
- Single Contract Limit: _____ Aggregate Limit: _____

- b. Bank(s) Name(s): _____
- Branch: _____
- Contact person: _____ Phone number: _____
- Credit limit: _____

- c. Identify the company's/creditors including banks and the amount of money owed to:

<u>Creditor</u>	<u>Loan Guarantor(s)</u>	<u>Address & telephone</u>	<u>Loan Amount</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

- d. Insurance company: _____
- Type of insurance: _____ Insurance limits: _____

e. List the business' three largest contracts or jobs.

<u>Contract/job type</u>	<u>Contact person</u>	<u>Telephone number</u>	<u>Contract amount</u>	<u>Bonded (Yes/No)</u>

8. **EQUIPMENT:** List the type and value of major equipment that is owned (O) or leased (L) by the business.

<u>Equipment</u>	<u>O/L</u>	<u>Value (\$ amount)</u>

9. **M/WBE JOINT VENTURE** - Joint ventures must provide a copy of the joint venture agreement.

M/WBE CERTIFICATION APPLICATION

AFFIDAVIT

STATE OF _____:
COUNTY OF _____: SS

I hereby declare and affirm that I am the _____ (Title)
of: _____ (Firm)

That I am duly authorized to execute the foregoing M/WBE Certification Application, and that the contents of said documents are complete, true and correct to the best of my knowledge and belief. I hereby certify that the documents include all material information necessary to identify the true and lawful owners of the subject business enterprise. Further, the undersigned is notified of their responsibility to submit an updated Minority/Woman Business Enterprise Certification Application whenever a change occurs in ownership, management or control of the company. Any M/WBE applicant, certified M/WBE principal(s) and all related parties, who misrepresents the status of any concern as an M/WBE, or is a party to such misrepresentation to obtain business or contracts with the School Board under the Business Development and Assistance Program, will be suspended from doing business with the School Board for fourteen (14) months.

(Corporate Seal), if appropriate

Minority/Woman Owner's Signature

On this _____ day of _____, 20 ____, personally appeared before me, the undersigned officer authorized to administer oaths: _____ known to be the person described in the foregoing affidavit, who acknowledged that he/she executed the same in the capacity stated and for the purposes therein contained.

IN WITNESS WHEREOF, I have hereunto set my hand and official seal.

Notary Public

My Commission Expires: _____

SEAL

**M/WBE
Certification Check List**

Please attach copies, not originals, of all applicable items. Incomplete applications cannot be processed, and failure to submit the documents will delay or result in termination of the application process.

Please check if documents are attached:

1. ☐ M/WBE certifications from other public agencies.
2. ☐ M/WBE Certification Application Affidavit (Page 6 of Application).
3. ☐ Miami-Dade County Public Schools Vendor Application.
4. ☐ Lease/purchase agreement for the business' facilities.
5. ☐ Current professional/business license(s).
6. ☐ Proof of citizenship or permanent resident status.
7. ☐ Resumes for owners and key personnel.
8. ☐ Lease/purchase agreements for major business equipment.
9. ☐ Most current application for bonding, if applicable.
10. ☐ Management agreement(s).
11. ☐ Loan agreement(s) or promissory note(s).
12. ☐ Birth certificate, drivers license, passport or any other document which substantiates the ethnicity/race/gender of owners, officers and directors.

***If any of the aforementioned documents are not available, please provide a written notarized statement that information is not available.**

13. Sole Proprietor - Submit all of the above items, as applicable and the following:

- ☐ U.S. IRS 1040-C Schedule.
- ☐ Fictitious name affidavit, if applicable.

14. Partnerships - Submit all of the above items, and the following:

- ☐ Partnership agreement(s).
- ☐ U.S. IRS 1065, with schedules.
- ☐ Profit sharing agreements.

15. Corporations - Submit all of the above items, and the following:

- ☐ Articles of Incorporation, with amendments.
- ☐ By-Laws, with amendments.
- ☐ The most current U.S. IRS Corporate Tax Return 1120 or 1120s, with all schedules.
- ☐ All issued and cancelled stock certificates (front & back).
- ☐ Minutes of the first shareholders' meeting.
- ☐ Minutes of the first board of directors' meeting.
- ☐ Minutes of meetings at which the current board of directors and officers were elected or appointed.
- ☐ Stock transfer ledger.
- ☐ Most current annual report filed with the Secretary of State.
- ☐ Profit sharing agreement(s).
- ☐ Agreements affecting management, control or rights of any stockholder(s).

16. ☐ Joint venture agreement(s).

17. ☐ Certificate(s) of insurance.

18. ☐ Sub-contractual agreement(s).

NOTE: If after filing this application, there is any significant change in the information submitted herein, you must inform the Division of Business Development and Assistance of the change, or the company may be denied certification.

Certified companies must inform the Division of Business Development and Assistance of any changes in the information contained herein, which formed the basis of certification. Failure to do so may result in denial , revocation or suspension of certification.

COMPLETE APPLICATION, INCLUDING VENDOR APPLICATION AND CATEGORY OF GOODS AND SERVICES LIST, SHOULD BE RETURNED TO:

**MIAMI-DADE COUNTY PUBLIC SCHOOLS
DIVISION OF BUSINESS DEVELOPMENT AND ASSISTANCE
1450 N.E. 2ND AVENUE, ROOM 456
MIAMI, FL 33132**

DEFINITION OF MINORITY/WOMEN BUSINESS ENTERPRISES

- (1) "Minority/Women Business Enterprises" means any legal entity, which is organized to engage in commercial transactions and which is at least fifty-one (51) percent owned and controlled by a minority person or persons.
- (2) "Minority person" means a person who is a citizen or lawful permanent resident of the United States, and who is:
 - (a) An African American, a person having origins in any of the Black racial groups of Africa;
 - (b) An Hispanic, a person of Spanish or Portuguese culture including, but not limited to, persons with origins in Mexico, South America, Central America, or the Caribbean Islands, regardless of race, or
 - (c) A Woman

WARNING

- (3) IT IS UNLAWFUL FOR ANY INDIVIDUAL TO FALSELY REPRESENT ANY ENTITY, AS A MINORITY/WOMEN BUSINESS ENTERPRISE, FOR THE PURPOSES OF QUALIFYING FOR CERTIFICATION UNDER A PROGRAM WHICH, IN COMPLIANCE WITH FEDERAL LAW, IS DESIGNED TO ASSIST MINORITY/WOMEN BUSINESS ENTERPRISES IN THE RECEIPT OF CONTRACTS FOR THE PROVISION OF GOODS OR SERVICES. ANY PERSON WHO VIOLATES THIS SECTION IS GUILTY OF A FELONY OF THE SECOND DEGREE, PUNISHABLE AS PROVIDED IN S. 775.082 OR S. 775.084.

(102891)

ATTACHMENT C

FLEET MAINTENANCE MANAGEMENT SOFTWARE CHECKLIST

INSTRUCTIONS: Please respond to each requirement with a yes or no. Provide the reference page where the response can be located in your submitted proposal. Failure to respond in this format could result in the committee's inability to locate information regarding a specific requirement.

SOFTWARE GENERAL REQUIREMENTS	MEETS	REFERENCE
1. The system must have the ability to plan and schedule MSI in the most efficient and effective arrangement based on available school day(s) calendar and shop available resources.		
2. The system must have the ability to distinguish or separate maintenance repairs from non-maintenance jobs, such as operational improvement requests, warranty claims, and manufacturer recall reimbursements at the job or task level.		
3. The system provider must have installations in the United States where it can be observed in normal operation.		
4. The system must operate from a centralized database using Microsoft SQL server for the backend, there by eliminating the need to backup data files from different locations.		
5. Does the system operate in a true client-server mode using a wide area network (WAN) utilizing full T1 digital line (1.544Mbps) and TCP/IP as the transport protocol?		
6. Is the system capable of accommodating as many as 100 concurrent users accessing the database at any one time? Is it scalable for additional users in the future?		
7. Does the system facilitate the jointing of Windows 2000 domain using Windows authentication and group policy?		
8. The software services proposed must comply with all applicable federal, state and local guidelines in addition to all M-DCPS' Board Rules and internal procedures in effect as of the date of the proposal.		
9. The proposer must be capable of demonstrating their commitment to updating and maintaining the proposed service(s) to ensure that they remain in compliance with these requirements.		
10. Proposers must able to demonstrate that they have the necessary financial resources to devote to the project: <ul style="list-style-type: none">• Current financial statements• Bankruptcy information of proposer or affiliated firm for which proposer has a controlling interest. Explain if applicable.• Type of company (owned, public, private, corporation)		
11. Proposers must provide the names, titles, and resumes indicating qualifications, education, and experience of the key individual responsible for supporting the offered software. Proposers must describe the role of each key individual, who will be servicing the District's account.		

ATTACHMENT C

12. Technical support must be available from the time a signed contract is complete and easily accessible thereafter. Proposer must affirm in writing that proposer can and will via telephone, internet, and through on-site modem, provide support services, from 8:00 a.m. to 5:00 p.m., Eastern Standard Time, Monday through Friday, excluding district twelve month employee paid holidays.		
13. The vendor must provide a toll free telephone number that the district's administrative staff may use to contact the company during the recommended installation and implementation period. This toll free telephone number must be included as part of the initial proposal.		
14. Proposers must provide the District with a recommendation to support a Customer Service connection between the hours of 8:00 AM-to-5:00 PM (Eastern Standard Time) with a maximum 1 hour response time once the implementation period is over. If there is a cost to support a customer service connection, it should be included as part of the annual license and maintenance fees in accordance with the signed contract.		

REFERENCES

15. The vendor shall list a minimum of four current software users , including contact information, for the following: Locations where the vendor's system is used for daily operations of a large transit or trucking organization that maintains at least 1000 vehicles (buses, trucks, or automobiles) daily, of which 50 must be buses. Include entity's name, address, contact name & phone number, size of account, brief description of services provided, and date and dollar amount of the agreement. All software proposed must be in actual daily use by customers.		
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TERMS OF CONTRACT

16. All proposers must comply with all municipal, state, and federal statutes prohibiting discrimination. The proposer shall at all times comply with local, state, or national standards for the provision of services, whichever is more stringent.		
17. Proposers must agree that there will be no discrimination as to sex, race, color, creed, or national origin in regard to its obligations, work and services performed under the terms of their proposal.		
18. Each proposer must submit its equal employment policy and provide a detailed breakdown by ethnicity, gender, and occupational categories of its work force. (See Attachment A)		
19. Each proposer must state its Minority/Women Business Enterprise utilization. If a minority firm, which is woman-owned and operated, or African American owned and operated, is utilized in conjunction with the scope of work, the proposer is to indicate the scope of the women/minority proposer's work, experience in this type of required service, and experience of staff participating. All Minority/Women firms must be certified by the Division of Business Development and Assistance, prior to contract award. (See Attachment B.)		

ATTACHMENT C

VEHICLE INVENTORY MANAGEMENT MODULE

20. Does the system provide for the life-cycle tracking of vehicles and equipment (from purchase to disposal) with 8 or more alphanumeric vehicle number capability?		
21. Does the software provide the System Administrator with the capability of adjusting any or all meters in the event one or all are damaged and/or replaced?		
22. Does the software have the ability to incorporate all vehicles whether owned, leased or contracted by the District?		
23. Will the software allow for the input of information regarding vehicle data concerning the Line setting ticket, purchase price, current value, trade-in value, and depreciation per year etc?		
24. Does the software provide System Administrator with the capability of linking school year calendar to Monthly Safety Inspection schedule for school buses, while also providing the capability of using a traditional calendar for other vehicles not mandated for inspections by Florida Statutes?		
25. Does the software allow for Inspection scheduling with horizon capability, automatic generation, and preprinting of work orders? Does the System Administrator have the capability of schedule adjustment?		
26. Does the software offer the capability of assigning unlimited pieces of auxiliary equipment to a vehicle such as radio, wheelchair lifts or gates, cranes, emergency equipment, Global Positioning Satellite (GPS) etc?		
27. Does the software provide for a vehicle/equipment inactive or underutilized report?		

VEHICLE AND PARTS WARRANTY MODULE

28. Does the software offer the capability of a warranty tracking system that uses the Vehicle Maintenance Repair Standards codes (VMRS) for OEM extended warranties, and repairs or maintenance done by outsourced service providers?		
29. Is the Warranty Tracking module of parts and equipment capable of monitoring the warranty from various Original Equipment Manufacturers (OEM) and/or vendors, suppliers, dealers, and aftermarket parts warehouses?		
30. Does the warranty tracking module monitor miles, hours, and/or time of warranties using multiple meters?		
31. Does the warranty module integrate with system's work order process to immediately "Flag" or notify user of a possible warranty claim? Does the software have the capability of creating a warranty report of pending or outstanding warranty claims or schedule?		

ATTACHMENT C

32. Does the software have the capability of creating a warranty notice or "Tag"? How is it traced in the system? Is it bar coded or other form of traceable system?		
33. Does the warranty module track each purchase regardless of purchasing procedure? (I.e. Purchase orders or procurement card purchases)		

SYSTEM INTEGRATION CAPABILITIES

34. Does the software have the capability to integrate with other District systems such as the procurement management system known as Management Science American Finance (MSAF), the General ledger, Property Control, and DOT's Fuel Management System (E.J.Ward)?		
35. Is the software provider authentic in writing the system's integration capabilities, and commitment to integrate with other District systems in the future should the District decide to do so? At what cost (If any) would future expansions or integration be assessed?		

LIFE-CYCLE COST REPORTING

36. Does the software sort repair and maintenance reports by department's owner or assignments, by vehicle, by repairs codes or systems classifications, by dates, by maintenance and non-maintenance activities or transactions, and by work orders regardless of their status?		
37. Does the software life-cycle cost report include all parts, tires, fuel, and lubricants (warranted or expensed), labor (In-house or outsourced), cost-per-mile per individual repair system classification for year-to-date, life-to-date, and current period?		
38. Does the cost-per-mile report include individual tires expenditures, regular maintenance activities and non-maintenance activities such as recalls, warranties, fuel and all lubricants consumption?		
39. Does the software have the capability to sort by vehicle class or grouping?		
40. Does the cost-per-mile calculation include fuel consumption, tires, lubricants, labor, breakdowns, maintenance, and repairs?		

WORK ORDER MODULE

41. Does the system use Vehicle Maintenance Reporting Codes (VMRS)? Does it offer the capability to modify labor codes to user defined criteria?		
42. Does the software have the capability of incorporating an automated "Paperless" Shop option in real-time mode with the capacity to handle multiple shop floors?		
43. Does the software offer access to vehicle master file during work order creation process, including any overdue job from previous work orders?		

ATTACHMENT C

44. Does the software offer the capability to access look-up screens to various categories such as VMRS codes, vehicle numbers, departments, vendors, mechanics, parts, warranty claims, and any outsourced maintenance work?		
45. Does the work order module track outsourced work by vendor, purchase order, procurement card transaction, parts and labor charges?		
46. Does the software allow for all procurement card transactions to be captured on work orders, identifying all individual purchases in detail?		
47. Does the software allow for the establishment of work order priority codes? Is it capable of handling 10 or more user defined codes? Does it allow for the editing or deletion of codes once they are entered in work orders?		
48. Does the software allow for making any necessary changes to work orders? Work orders must be able to handle 100 or more repair lines with up to 5 lines (with 300 characters per each work order line event).		
49. Does the software allow for a comment area during the work order closing process, with a minimum of 3 lines (at 180 characters) per line?		
50. Does the software integrate with the parts inventory management component of the system to automatically charge a part to the specific work order and deplete the inventory?		
51. Does the software have the capability to import a real-time odometer or capture the most recent odometer via interface with the fuel management program (E.J.Ward)?		
52. Does the software provide a scheduled and overdue Monthly Safety Inspection report with capability of sorting by shop code, vehicle number, department, generation date, number of jobs scheduled, number of jobs completed, and number of hours scheduled?		

PARTS INVENTORY MANAGEMENT MODULE

53. Does the software offer a Parts Inventory Management module with capability to include purchasing of all transactions via procurement card or purchase orders?		
54. Does the Parts Inventory Management Module integrate with the work order section and does it have the capability of tracing all inventory and non-inventory parts?		
55. Does the software have the capability of providing 8 or more alpha-numeric bin locations for parts storage arrangement and is it capable of printing bar coded tags to identify bin locations?		
56. Is the software capable of tracking accumulated parts usage per period and year to date? Will it allow the user the ability to establish reorder points and quantities on a part by part basis?		
57. Does the system track and display parts currently on order/back order, and last invoice number and date?		

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58. Does the software identify via a flag or other notification that a particular part is either a stock or a non-stock part? The software must track the usage of non-stock parts as well as stock parts.		
59. Is the software capable of handling and tracking different parts categories, such as components, oil, tires, antifreeze, lubricants, fuel etc? The part warranties must be tracked by miles/hours, months and/or years.		
60. Is the software capable of tracking and generating component failure statistics by miles/hours, months, and/or years?		
61. Does the software have the capability of incorporating new technology such as bar-coding or other data collection programs?		
62. Does the parts inventory module allow for adjustments (credits) to work orders and inventory levels upon parts being return to inventory regardless of purchasing method?		
63. Does the parts module have the capability to allow the user the ability to print distribution list by bin location, all parts (stocked and non-stocked), with or without bar codes, including committed purchases such as back orders and on-order purchases?		
64. Does the software have the capability to generate a parts management reports (for display or printing) that shows low usage of parts for the last 13 consecutive periods of use, general usage report by vendor or part number, quantities used per part, per period., inventory balance reports by accounting structures, inventory adjustment reports, purchase order transaction reports by part number and/or date, parts usage by work order, part failure analysis, and warranty reporting by part number or vehicle number?		
65. Does the purchase order transaction report include part number, purchase date, part description, vendor; quantity purchased, purchase order number, part cost, and extended totals?		
66. Does the parts usage by work order report identify parts expenditures by individual part number for a single part or multiple parts? Does it include repair order number, vehicle number, repair code, transaction or activity date, quantity, price per part, and total expenses to a work order?		
67. Does the part failure analysis report recognize the periods or intervals that a part fails during the traceable warranty period, whether it is being tracked by miles, hours, months and/or years, for year-to-date, life-to-date or specific period -to-date?		
68. Does the vendor information include the vendor by number (with 10 or more numeric digits), vendor name or abbreviation (with 14 or more alpha digits), contact name, address, City, State, Zip, phone number, terms, payment due dates, discount due dates and percentages, delivery mode and time, tax ID # or any other information regarding vendor.		
69. Does the software track all transactions with each specific vendor, to include but limited to, last purchase date, total PO's, PO budget, PO budget used, PO running balance, blanket PO or any extensions, blanket PO expiration date, an a area for comments to allow for up to 99 different entries for vendor performance remarks?		

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TIRE MANAGEMENT AND REPORTING MODULE

70. Does the tire management module track each tire owned or leased by the District? Does it include tire number, vehicle mounted on, position on vehicle, number of times recapped, manufacturer, capper number, size, type, load range, purchase price, casing value, current value, mounted mileage, date mounted on vehicle, tire life miles, tread depth, months in use, runoff percentage, cost per mile (CPM), average miles per 32 nd , projected total mileage.		
71. Does the tire management program track all warranty claims, by manufacturers and revenue (credit) achieved via a warranty claim?		
72. Does the software track all tire transaction and generate a report by failure codes or causes?		

FUEL MANAGEMENT MODULE INTERFACE

73. Does the software have the capability to electronically interface with the district's fuel management system (E.J.Ward) and expense all fuel transactions to each district owned vehicle?		
74. Does the software have the capability to track all fuel transactions and ensure they are tracked by miles, hours, gallons, date, and usage from last fuel transaction, including oil or other lubricant usage?		
75. Does the software have the capability of generating an odometer exception report after it has recognized an error related to the odometer?		
76. Does the software have the capability of generating an average monthly vehicle and/or equipment usage report? Is it available by user requirements, whether in display or print format, itemizing the average miles/hours by each vehicle or piece of equipment?		

FINANCIAL MANAGEMENT MODULE INTERFACE

77. Does the software provider commit to interface with the District's current financial program which is the Management Science American Finance (MSAF) and will it be able to incorporate modifications to the existing system or a complete upgrade? Does the provider offer this commitment in writing?		
78. Is the software capable of generating automatic parts requisitioning when inventory falls below reorder point? The District must have the option between min/max methods or reorder quantity method for restocking inventory.		
79. Does the software allow for changes to parts on requisition of vendors, adjustments in price and/or quantities?		
80. Does the financial management module allow for the creation of Blanket purchase orders with up to 999 extensions which include funding structure, and budget used, running balance, current extension, first extension, purchase order start and expiration dates, prior blanket purchase order for vendor?		
81. Is the software capable of tracing all transactions made via procurement card, and charge each transaction by line item on		

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work orders and monitor for warranty adjustment or claims?		
82. Does the system provide for the capability of tracking warranty claims for all vendors or by a specific vendor, regardless how it was purchased?		
83. Does this module identify a recurring part purchase to determine if the part or parts should be stocked instead of purchased Just-in-time via procurement card?		
84. Does the software provide a purchase order summary report which must be available by purchase order or by vendor? The report must list purchase order number, generation date, received date, shipping date and time, vendor number and name or abbreviation, purchase order cost, and status.		

SHOP MANAGEMENT (PAPERLESS SHOP) MODULE

85. Does the software have a shop management module, which provides real-time monitoring of all activities and personnel assigned to a specific workstation or location?		
86. Does the software have the capability of tracking all work-pending repair or maintenance orders, emergency work, and scheduled work orders? Additionally, this module must be capable of importing and/or exporting data from all the other modules mentioned in this RFP.		
87. Does the shop management section identify by user defined criteria, "who is doing what, and when they are doing it" in each individual or specific work location?		
88. Is the software capable of having each individual employee clock in-and-out of assigned job duties or tasks? Must allow for an unlimited number of assignments to each employee.		
89. Does the shop management module calculate the actual time spent on each assigned job and track individual productivity of each employee? A user defined productivity report must then automatically generate by work location to identify the planned versus actual time spent on each job or task.		
90. Does the shop management module allow the end-user the ability to add, delete, and/or reprioritize jobs to employees throughout the workday at each specific location or site?		

MANAGEMENT REPORT MODULE

91. Does the management report module allow the user the ability to customize reports? This module must have the ability of sorting the data in any order, any field, or combination thereof.		
92. Does the management report module allow the user the ability to control every data line, so that the user adapts or modifies to its needs/		
93. Is the system's perpetual data, such as date, time, page, record counter, etc. available for inclusion in reports if the user so requires it? The report itself must be available for display and/or printing.		
94. Does the software allow the user to scroll through (Up or down,		

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forward or backward, side to side) reports to find specific areas within the report?		
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SYSTEM REQUIREMENTS

95. Is the proposed software capable of importing and exporting a variety of fleet maintenance information, such as new or improved repair techniques?		
96. Does the proposal describe in detail how the system deals with items that must be handled through manual data entry and/or via data import and/or export process?		

PROCESSING

97. Does the proposal cover all of the requirements in this section?		
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