



METRO

PEOPLE PLACES

OPEN SPACES

RFP 10-1658-PES

Fleet Management Software

Metro Parks and Environmental Services

600 N.E. Grand Avenue
PORTLAND, OR 97232
(503) 797-1850

Project Manager:

Lydia Neill
(503) 797-1830

lydia.neill@oregonmetro.gov

Notice is hereby given that proposals for RFP 10-1658-PES for: Fleet Management Software shall be received by Metro, 600 N.E. Grand Avenue, Portland OR 97232 until 3:00 p.m., May 14, 2010. It is the sole responsibility of the proposer to ensure that Metro receives the Proposal by the specified date and time. All late Proposals shall be rejected. PROPOSERS SHALL REVIEW ALL INSTRUCTIONS AND CONTRACT TERMS AND CONDITIONS.

Request for Proposals # 10-1658-PES

FOR

Fleet Management Software

I. INTRODUCTION

Metro is the directly elected regional government that serves more than 1.2 million residents in Clackamas, Multnomah and Washington Counties and 25 cities in the Portland Metropolitan area. Metro is responsible for regional growth management, transportation and land use planning, environmental management, operation of the Oregon Zoo, regional parks and open spaces and natural area acquisition.

Metro, a metropolitan service district organized under the laws of the State of Oregon and the Metro Charter, located at 600 NE Grand Avenue, Portland, OR 97232-2736, is requesting proposals for services related to the procurement of software to manage a fleet of light and medium duty trucks, passenger cars, equipment and vans.

Proposals will be due no later than 3 p.m., May 14, 2010 in Metro's business offices at 600 NE Grand Avenue, Portland, OR 97232-2736, Attention: Lydia Neill, RFP #10-1658-PES.

Details concerning the project and proposal are contained in this document.

II. BACKGROUND/HISTORY OF PROJECT

The objective of this project is to automate the tracking, periodic maintenance/warranty maintenance, checkout of pool vehicles, budget expense tracking by vehicle and by user group, allotment of replacement costs for vehicles and equipment depreciation in Metro's fleet. Metro's fleet is composed of approximately 100 on-road vehicles including light and medium duty trucks, dump trucks, trailers, vans and gas and hybrid passenger cars (see Attachment B – Vehicle and Equipment Inventory). Currently the vehicles are owned, leased and rented. The composition of the fleet is likely to change over the next six to eight months to include more owned, fuel efficient and alternative fuel vehicles.

Metro's fleet is dispersed in various operational centers for use by employees and elected officials in the performance of Metro's business. Metro has over 750 regular employees. The scheduling system is currently controlled by an administrator. This procedure may be delegated to individuals if the system is easily operated and can be effectively controlled. These locations include field stations, regional parks, a landfill, industrial type sites and the zoo. Metro manages over 25,000 acres of natural areas located throughout the Metro region that were purchased through several bond measure programs that were approved to preserve open space and improve natural habitat and water quality. Oxbow and Blue Lake regional parks are located in the eastern portion of the region and provide swimming, picnicing, archery, access to the Sandy River and camping. Metro also manages two boat ramps that provide access to the Columbia River. Metro's fleet of off-road equipment is dispersed at the same locations as the on-road equipment and contains backhoes, tractors, excavators, fork-lifts and other heavy and light duty equipment required to operate parks, manufacture paint, and maintain a landfill, waste transfer stations and a headquarters office.

Maintenance of vehicles and off-road equipment is performed by outside vendors, usually located off-site. Vendors will be required to pick up vehicle, service and return it to the site where it is stationed. Off-road equipment will most likely be serviced at the site where it is stationed.

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III. PROPOSED SCOPE OF WORK/SCHEDULE

Metro is seeking proposals from qualified vendors who will deploy a fully functional fleet management and tracking system for use by Metro staff to track and schedule the assets described above. The selected vendor will be required to work with Metro staff to provide the product and services described below and to offer the possibility of assisting in populating the system with the appropriate data on the current fleet of vehicles and to screen potential operators (Metro staff) of equipment and vehicles.

A. Scope of Work

1. Objectives: The fleet management software system must be an easy to use software package that can cost effectively assist in the management and scheduling of the fleet of vehicles and equipment. The ideal system will include the following features:

- Easy entry and reporting capabilities for the fleet manager
- Ability to allow multiple groups of employees to schedule and check out sub-groups of vehicles and integration with Outlook
- Track information on individual vehicles and equipment and see the availability of vehicles by time and user
- Ability to provide GPS tracking of vehicles, vehicle idling and a swiper badge system for vehicle key access (Alternative #1)
- Print canned and customized reports that summarize costs, by department or location, failure by service type, vendor service response times and costs, fuel usage and costs, depreciation, renewal and replacement costs by department-location and individual vehicle or piece of equipment
- Produce and generate work order requests with an auto-notification feature to assigned users and maintenance vendors
- Track licensing and certification requirements for drivers and allow for fleet manager to control check out process
- Link service of vehicles with check-out system
- Track DEQ emission testing, registration and titling requirements
- Track warranty work in either miles or in machine hours as appropriate
- Track periodic maintenance work either in miles or machine hours
- Integrate with a Voyager fueling card system for fleet vehicles
- Integrate with a Petrovend type card lock system for tanks located at Blue Lake, Oxbow Parks and the Oregon Zoo
- Provide support services for upgrades and trouble shooting
- Provide data entry services for existing fleet information for all vehicles/equipment if requested
- Training provided as required by Metro

2. Services Provided:

The vendor will provide software, installed at Metro or hosted by the vendor, which provides the general functionality and compatibility with Metro's IS standards in Appendix 1:

- 1) System shall provide the option of automatically interfacing and updating mileage saved on Voyager Gas Card System
- 2) System shall provide the option of automatically interfacing with a card lock system at Blue Lake and Oxbow Parks for fueling and mileage updates by vehicle equipment
- 3) System shall allow customization of reports
- 4) System shall provide a screen that allows viewing of all vehicles that are in the check out pool, similar to Schedule Assistant on Microsoft Outlook (See Attachment A)

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- 5) System shall allow multiple pools of vehicles to be set up and checked out by different sets of employees
- 5) System shall allow fleet manager the ability to identify who has scheduled cars
- 6) System shall allow access for up to 750 users (not all employees are likely to use the system 100% of the time) for scheduling of vehicles from the designated pools of vehicles
- 7) System shall provide comprehensive reporting capability with ability to export to Adobe Acrobat (.pdf), Microsoft Word (.doc or .docx) and Excel (.xls or .xlsx)
- 8) System provides separate environments for development, testing and production.
- 9) System provides security to restrict access to authorized personnel and protect the confidentiality of data.

3. Support and Updates

- a. *On-going system maintenance* – The vendor will conduct an active program of product development and improvement that produces regular upgrade and/or maintenance releases of the base software.
- b. *Help line support* – The vendor will provide a help line which Metro staff uses to report and resolve problems and questions encountered during use of the system.
- c. *Administrative and end-user training* – The vendor will provide a schedule of classes or on-line training to support the set-up, administration and application of the fleet tracking system.
- d. *Implementation plan* – The vendor will propose an implementation project plan :
 1. With a timeline consistent with the over-all project schedule detailed below,
 2. That clearly states the members of the project team and their roles
 3. Establishes a means of issue tracking and resolution
 4. Establishes regular communication of project status
 5. Provide a work plan that addresses these general tasks and milestones:
 - a. Assess current business practices and requirements
 - b. Familiarize Metro staff with the product through a web-based demonstration
 - c. Map current practices and requirements onto the target system
 - d. Configure the target system and customize as necessary
 - e. Train Metro staff
 - f. Develop a test plan for the system
 - g. Execute test plan for the system
 - h. Go-live
 - i. Provide a post implementation review and support

B. Schedule

The proposed implementation project plan will recognize these project milestones:

| | |
|--------------------------------|------------|
| RFP release | 04/21/10 |
| Responses due | 05/14/2010 |
| Vendor Selected | 06/1/2010 |
| Implementation project kickoff | 06/15/2010 |
| Go-Live | 07/1/2010 |

IV. QUALIFICATIONS/EXPERIENCE

Proposers shall possess the following knowledge and experience:

- Knowledge and experience with fleet management and tracking systems that are either client based or hosted.
- Successful deployment with similar types of organizations that have a similar number and type of assets (vehicles and equipment).
- Five years of experience providing and managing deployment of fleet management software systems

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V. PROJECT ADMINISTRATION

Lydia Neill is the Metro project manager and will manage the resulting contract. The vendor shall provide one single person as project manager to work with Metro.

VI. PROPOSAL INSTRUCTIONS

A. Submission of Proposals

10 copies of the proposal shall be furnished to Metro, addressed to:
Metro Parks and Environmental Services
Attention: Lydia Neill, RFP #10-1658-PES
600 NE Grand Avenue
Portland, OR 97232-2736

B. Deadline

Proposals will not be considered if received after 3 p.m., May 14, 2010.

C. RFP as Basis for Proposals:

This Request for Proposals represents the most definitive statement Metro will make concerning the information upon which Proposals are to be based. Any verbal information which is not addressed in this RFP will not be considered by Metro in evaluating the Proposal. All questions relating to this RFP should be addressed to Lydia Neill, lydia.neill@oregonmetro.gov at (503) 797-1830. Any questions, which in the opinion of Metro, warrant a written reply or RFP amendment will be furnished to all parties receiving this RFP. Metro will not respond to questions received after May 5, 2010.

D. Information Release

All Proposers are hereby advised that Metro may solicit and secure background information based upon the information, including references, provided in response to this RFP. By submission of a proposal all Proposers agree to such activity and release Metro from all claims arising from such activity. In Accordance with Oregon Public Records Law (ORS 192), proposals submitted will be considered part of the public record, except to the extent they are exempted from disclosure.

E. Minority, Women and Emerging Small Business Program

In the event that any subcontracts are to be utilized in the performance of this agreement, the Proposer's attention is directed to Metro Code provisions 2.04.100, which encourages the use of minority, women and emerging small businesses (MWESB) to the maximum extent practical. Copies of these MWESB requirements are available from the Metro Procurement Office, 600 NE Grand Avenue Portland, OR 97232, (503) 797-1816.

VII. PROPOSAL CONTENTS

The proposal should contain no more than 13 pages of written material in addition to all forms in Appendix 1 (excluding biographies and brochures, which may be included in an appendix), describing the ability of the consultant to perform the work requested, as outlined below. The proposal should be submitted on recyclable, double-sided recycled paper (post consumer content). No waxed page dividers or non-recyclable materials should be included in the proposal.

A. Transmittal Letter: Indicate who will be assigned to the project, who will be project manager, and that the proposal will be valid for ninety (90) days.

-- 1 page maximum

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- B. Approach/Project Work Plan: Describe how the work will be done within the given timeframe and budget. Include a proposed work plan, scope and schedule.
-- 2 pages maximum, in addition to completing forms 1.4, 1.5 and 1.6 in Appendix 1
- C. Staffing/Project Manager Designation: Identify specific personnel assigned to major project tasks, their roles in relation to the work required, percent of their time on the project, and special qualifications they may bring to the project. Include resumes of individuals proposed for this contract.

Proposals must identify a single person as project manager responsible for working directly with Metro. The consultant must assume responsibility for any sub-consultant work and shall be responsible for the day-to-day direction and internal management of the consultant team effort.
-- 2 pages maximum, complete form 1.7, Appendix 1
- D. Experience: Indicate how your firm meets the experience requirements listed in section IV of this RFP. List projects conducted over the past five years which involved services similar to the services required here. For each of these other projects include the name of the customer contact person, his/her title, role on the project, and telephone number. Identify persons on the proposed project team who worked on each of the other projects listed, and their respective roles.
-- 2 pages maximum, complete forms 1.2 and 1.3, Appendix 1
- E. Cost/Budget/Service Requirements: Present the proposed cost of the project and the proposed method of compensation. List software and licensing fees, consulting/training charges, data entry and consultation, user fees and any yearly charges after initial purchase. Pricing may be provided by an hourly rate or unit costs. Any additional expenses requested should also be listed and itemized by category.
-- 4 pages maximum, complete form 1.8, Appendix 1
- F. Exceptions and Comments: To facilitate evaluation of proposals, all responding firms will adhere to the format outlined within this RFP. Firms wishing to take exception to, or comment on, any specified criteria within this RFP and attached public contract are encouraged to document their concerns in this part of their proposal. Exceptions or comments should be succinct, thorough and organized.
-- 1 page maximum
- G. Diversity in Employment and Contracting: Include what efforts have been made by your firm on past projects to ensure a diverse workforce, including policies and practices to promote the hiring of women and ethnic minorities. Additionally, list what programs and outreach efforts have been made in on past projects to promote the use minority, women and emerging small businesses in your contracting and procurement processes. List any outreach efforts and/or sub-consultants to be utilized on this project.
-- 1 page maximum

VIII. GENERAL PROPOSAL/CONTRACT CONDITIONS

- A. Limitation and Award: This RFP does not commit Metro to the award of a contract, nor to pay any costs incurred in the preparation and submission of proposals in anticipation of a contract. Metro reserves the right to waive minor irregularities, accept or reject any or all proposals received as the result of this request, negotiate with all qualified sources, or to cancel all or part of this RFP.
- B. Billing Procedures: Proposers are informed that the billing procedures of the selected firm are subject to the review and prior approval of Metro before reimbursement of services can occur. Contractor's invoices

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shall include an itemized statement of the work done during the billing period, and will not be submitted more frequently than once a month. Metro shall pay Contractor within 30 days of receipt of an approved invoice.

- C. Validity Period and Authority: The proposal shall be considered valid for a period of at least ninety (90) days and shall contain a statement to that effect. The proposal shall contain the name, title, address, and telephone number of an individual or individuals with authority to bind any company contacted during the period in which Metro is evaluating the proposal.
- D. Conflict of Interest. A Proposer filing a proposal thereby certifies that no officer, agent, or employee of Metro or Metro has a pecuniary interest in this proposal or has participated in contract negotiations on behalf of Metro; that the proposal is made in good faith without fraud, collusion, or connection of any kind with any other Proposer for the same call for proposals; the Proposer is competing solely in its own behalf without connection with, or obligation to, any undisclosed person or firm.
- E. Equal Employment and Nondiscrimination Clause Metro and its contractors will not discriminate against any person(s), employee or applicant for employment based on race, color, religion, sex, national origin, age, marital status, familial status, gender identity, sexual orientation, disability for which a reasonable accommodation can be made, or any other status protected by law. Metro fully complies with Title VI of the Civil Rights Act of 1964 and related statutes and regulations in all programs and activities. For more information, or to obtain a Title VI Complaint Form, see www.oregonmetro.gov.

IX. EVALUATION OF PROPOSALS

- A. Evaluation Procedure: Proposals received that conform to the proposal instructions will be evaluated. The evaluation will take place using the evaluation criteria identified in the following section. Interviews and demonstrations of the software system may be requested prior to final selection of one firm.
- B. Evaluation Criteria: This section provides a description of the criteria which will be used in the evaluation of the proposals submitted to accomplish the work defined in the RFP.

| | Percentage of Total Score |
|--|---------------------------|
| — Project Service Approach | |
| 1. Commitment to project and ability to offer full range of services | 20 |
| 2. Ability to provide features specified within timeline | 10 |
| — Project Staffing Experience and References | |
| 1. Direct experience with similar type users | 10 |
| 2. Experience by fleet size and complexity | 10 |
| — Budget/Cost Proposal | |
| 1. Overall software cost, costs for additional services or features | 30 |
| 2. Future charges, subscription and fees and upgrades | 10 |
| — Diversity in Employment and Contracting | |
| 1. Policies and practices that promote a diverse workforce | 5 |
| 2. Use of MWESB contractors and suppliers | 5 |
| | 100% |

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X. APPEAL OF CONTRACT AWARD

Aggrieved proposers who wish to appeal the award of this contract must do so in writing within seven (7) days of issuance of the notice of intent to award by Metro. Appeals must be submitted to Darin Matthews, Procurement Officer, 600 NE Grand, Portland, Oregon 97232 and must state the specific deviation of rule or statute in the contract award. Metro will issue a written response to the appeal in a timely manner.

XI. NOTICE TO ALL PROPOSERS -- STANDARD AGREEMENT

The attached personal services agreement (Attachment C) is a standard agreement approved for use by the Office of Metro Attorney. This is the contract the successful Proposer will enter into with Metro; it is included for your review prior to submitting a proposal.

Attachment A- Check Out Example Request for Proposals # 10-PES

ATTACHMENT A

Example of check-out screen for pool vehicles

Attachment A is an example of the type of display that would facilitate the efficient use of Metro's pool vehicles by employees. The check-out pool of vehicles (at Metro Headquarters) will be potentially accessed by over 150 employees. Being able to see which cars are available by day and week and destination would optimize the use of vehicles in the pool and speed the check-out process.

Metro Regional Center
 600 NE Grand Ave
 Portland OR 97232

Fleet Vehicle Reservations

Date _____
 Day _____

| Fleet Vehicle | 7 | 30 | 8 | 30 | 9 | 30 | 10 | 30 | 11 | 30 | 12 | 30 | 1 | 30 | 2 | 30 | 3 | 30 | 4 | 30 | 5 | |
|---------------------------------|---|----|---|----|---|----|----|----|----|----|----|----|---|----|---|----|---|----|---|----|---|--|
| White Jeep Cherokee E248601 | | | | | | | | | | | | | | | | | | | | | | |
| Maroon Jeep Cherokee E226638 | | | | | | | | | | | | | | | | | | | | | | |
| Tan Chevy Impala E226419 | | | | | | | | | | | | | | | | | | | | | | |
| Tan Chevy Impala E226423 | | | | | | | | | | | | | | | | | | | | | | |
| Blue Toyota Prius E240761 | | | | | | | | | | | | | | | | | | | | | | |
| Tan Toyota Prius E240758 | | | | | | | | | | | | | | | | | | | | | | |
| Silver Ford Taurus. E222977 | | | | | | | | | | | | | | | | | | | | | | |
| Tan Ford Ranger E191558 | | | | | | | | | | | | | | | | | | | | | | |

Attachment B- Vehicle and Equipment Inventory Request for Proposals # 10-1658-PES

600 NE Grand Ave.
Portland, OR 97232-2736
(503) 797-1700

| Plate Number | Year | Make | Vehicle Model |
|--------------|------|-----------|-----------------------------------|
| E197132 | 1987 | Chevrolet | G10 Van |
| E226638 | 2004 | Jeep | Cherokee |
| E215844 | 2000 | Chevrolet | Astro Van |
| E219246 | 2003 | Ford | F250 |
| E220928 | 2002 | Chevrolet | Blazer |
| E191558 | 1994 | Ford | Ranger pickup |
| E222977 | 2002 | Ford | Taurus |
| E226419 | 2003 | Chevrolet | Impala |
| E226423 | 2003 | Chevrolet | Impala |
| E240758 | 2007 | Toyota | Prius |
| E240761 | 2007 | Toyota | Prius |
| E248601. | 1999 | Jeep | Cherokee |
| E228863 | 2004 | Ford | Ranger pickup |
| E211112 | 1999 | Dodge | 3/4 Ton pickup |
| E249977 | 2010 | Ford | F-250 Super Duty pickup |
| E235875 | 2009 | Chevrolet | Colorado |
| E235876 | 2008 | Chevrolet | Colorado |
| E227952 | 2004 | Ford | F450 3 YD Dump truck |
| E227951 | 2004 | Ford | F450 3YD Dump Truck |
| E249978 | 2010 | Ford | F-250 Super Duty pickup |
| 249976 | 2010 | Ford | F-250 Super Duty pickup |
| E215518 | 2000 | Ford | Econoline Van |
| E225250 | 2004 | Ford | Ranger pickup |
| E229955 | 2005 | Ford | Ranger pickup |
| E169484 | 1998 | Ford | F350 pickup |
| E204959 | 1997 | Ford | Ranger pickup super cab V6 XL |
| E187707 | 1993 | Ford | Ranger Ext Cab pickup V6 |
| E249979 | 2010 | Ford | F-250 Super Duty Pickup |
| E215512 | 2001 | Dodge | Dodge 2500 4 X 4 |
| E227953 | 2004 | Ford | Ranger pickup |
| E193399 | 1994 | Jeep | Cherokee V6 4x4 |
| E246950 | 1996 | Ford | Ranger pickup super cab V6 XL 4x4 |
| E239290 | 2006 | Jeep | Cherokee Laredo 4x4 V6 |
| E249106 | 2010 | Ford | F250 pickup |
| E249969 | 2010 | Ford | F250 pickup |
| E208700 | 1998 | Ford | F150 pickup |
| E223908 | 2002 | Ford | Edge |
| E235900 | 2009 | Ford | Ranger pickup XLT 4x4 |
| E246903 | 2008 | Ford | F250 pickup |

Attachment B- Vehicle and Equipment Inventory

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| Plate Number | Year | Make | Vehicle Model |
|--------------|------|-----------|-----------------------------------|
| E246936 | 2009 | Chevrolet | Colorado |
| E247369 | 2009 | Ford | F250 pickup |
| E227952 | 2004 | FORD | F450 Dump Truck 3YD |
| E227951 | 2004 | FORD | F450 Dump Truck 3YD |
| E180022 | 1991 | GMC | 1T Dump Truck 3 YD |
| E188800 | 1993 | FORD | F700 Dump Truck 5 YD |
| E188801 | 1993 | FORD | F700 Dump Truck 5 YD |
| E222698 | 1994 | FORD | F350 1 Ton 4x4 dump truck |
| E247546 | 2008 | Ford | E250 Van |
| 571DNN | 2007 | Toyota | 4Runner |
| 574CKE | 2006 | Suburau | Outback |
| 641DXC | 2008 | Toyota | Tacoma pickup |
| E236960 | 2008 | Ford | F350 Super Duty Crew Truck |
| TUQ067 | 2002 | Toyota | Tundra pickup |
| ZPF597 | 2004 | Jeep | Grand Cherokee |
| ZPF718 | 2004 | Jeep | Grand Cherokee |
| E182561 | 1991 | Dodge | Caravan |
| E222677 | 1992 | Ford | Ranger pickup |
| E228390 | 2004 | Ford | F350 pickup |
| E235144 | 2006 | Chevrolet | 1500 Pickup |
| E234836 | 2007 | Chevrolet | Trailblazer |
| E234837 | 2008 | Chevrolet | Trailblazer |
| CMT821 | 2006 | Chevrolet | Malibu |
| E222676 | 1992 | Ford | Ranger pickup |
| E219299 | 1999 | Ford | Enclosed Truck |
| E214717 | 1995 | Freight | Enclosed Truck |
| E217771 | 1995 | WHGM | Enclosed Truck |
| E230704 | 2004 | GMC | TC5C042 |
| E214715 | 1997 | Chevrolet | 3500 Club cab |
| E212167 | 1999 | Ford | F350 Superduty Crew pickup |
| E214718 | 1993 | Ford | Ranger pickup |
| E214728 | 1996 | Ford | F450 F47 Super Duty (Dump Bed) |
| E214734 | 2002 | Ford | Ext Cab |
| E214747 | 2003 | Chevrolet | Ext Cab |
| E220531 | 1997 | Ford | F350 (Crane Attached) Water Truck |
| E236953 | 2006 | Chevrolet | 3500 Flat Bed |
| E250596 | 2002 | Ford | Explorer |
| E217784 | 1991 | Chevrolet | Astrovan |
| E218825 | 2002 | Toyota | Prius |

Attachment B- Vehicle and Equipment Inventory Request for Proposals # 10-1658-PES

600 NE Grand Ave.
Portland, OR 97232-2736
(503) 797-1700

| Plate Number | Year | Make | Vehicle Model |
|--------------|------|-----------|----------------------|
| E148211 | 1981 | Toyota | 1/2 Ton Pickup |
| E161950 | 1986 | Chevrolet | Astro Van |
| E164983 | 1988 | Chevrolet | Sportsvan G20 |
| E165043 | 1990 | Chevrolet | Astro Van |
| E168591 | 1988 | Chevrolet | Astro Van |
| E178922 | 1989 | Chevrolet | 1500 |
| E195597 | 1994 | Toyota | Previa Van |
| E201807 | 1999 | Ford | F350 pickup |
| E201808 | 1999 | Ford | Econoline E250 |
| E205412 | 1998 | Nissan | Frontier pickup |
| E205668 | 1997 | Ford | Ford F250 pickup |
| E222137 | 1998 | Dodge | Ram Wagon |
| E223958 | 2002 | Dodge | Ram 12 Passenger Van |
| E236072 | 2006 | Dodge | Caravan |
| E236951 | 2006 | Ford | Escape Hybrid |
| E236952 | 2006 | Ford | Ranger pickup |
| E236954 | 2006 | Chevrolet | Silverado |
| E236955 | 2006 | Ford | Econoline Van 150 |

Master Equipment Fleet Inventory

| EQ # | Year | Make | Model | Class |
|-------|------|-------|--------------|-----------------|
| MCPC | 1983 | JD | 950 | TRACTORS/MOWERS |
| PM101 | 1990 | JD | 21-BAGGER | SM EQUIP |
| PM102 | 1992 | STIHL | BR400 | SM EQUIP |
| PM103 | 2000 | GMACH | TRIMMER | SM EQUIP |
| PM104 | 1984 | SNAP | 21INCH | SM EQUIP |
| PM108 | 1984 | GMACH | TRIMMER | SM EQUIP |
| PM109 | 1978 | GMACH | TRIMMER | SM EQUIP |
| PM112 | 1994 | STIHL | BACKPACKBLOW | SM EQUIP |
| PM113 | 1994 | STIHL | BACKPACKBLOW | SM EQUIP |
| PM114 | 1994 | STIHL | BACKPACKBLOW | SM EQUIP |
| PM115 | 1988 | ROBIN | BRUSHCUTTER | SM EQUIP |
| PM116 | 1993 | JD | EDGER | SM EQUIP |
| PM117 | 1978 | MCLAN | EDGER | SM EQUIP |
| PM118 | 1979 | MCLAN | EDGER | SM EQUIP |
| PM119 | 1978 | MCLAN | EDGER | SM EQUIP |
| PM120 | 1991 | GRACO | H91C | SM EQUIP |
| PM122 | 1987 | JD | EDGER | SM EQUIP |
| PM123 | 1987 | JD | EDGER | SM EQUIP |
| PM124 | 1993 | JD | 14PZ | SM EQUIP |

Attachment B- Vehicle and Equipment Inventory Request for Proposals # 10-1658-PES

600 NE Grand Ave.
Portland, OR 97232-2736
(503) 797-1700

| EQ # | Year | Make | Model | Class |
|--------|------|-------|--------------|--------------|
| PM125 | 1986 | TORO | 21-ROTARY | Mower |
| PM126 | 1977 | TORO | 21-ROTARY | Mower |
| PM127 | 1986 | MCLAN | EDGER | SM EQUIP |
| PM128 | 1986 | MCLAN | EDGER | SM EQUIP |
| PM129 | 1988 | JD | 21-BAGGER | SM EQUIP |
| PM130 | 1988 | JD | 21-BAGGER | SM EQUIP |
| PM131 | 1981 | JD | N21PK | SM EQUIP |
| PM132 | 1987 | JD | 21-BAGGER | SM EQUIP |
| PM133 | 1981 | GMACH | BACKPACKBLOW | BACKPACKBLOW |
| PM134 | 1981 | GMACH | TRIMMER | SM EQUIP |
| PM139 | 1982 | GMACH | TRIMMER | TRIMMER |
| PM140 | 1990 | GMACH | BACKPACKBLOW | BACKPACKBLOW |
| PM141 | 1990 | GMACH | BACKPACKBLOW | BACKPACKBLOW |
| PM150 | 1991 | SNAP | BACKPACKBLOW | SM EQUIP |
| PM150A | 1993 | STIHL | ZSTIBR400 | SM EQUIP |
| PM151 | 1984 | GMACH | BACKPACKBLOW | SM EQUIP |
| PM152 | 1984 | GMACH | BACKPACKBLOW | SM EQUIP |
| PM153 | 1981 | GMACH | BACKPACKBLOW | SM EQUIP |
| PM154 | 1988 | GMACH | TRIMMER | SM EQUIP |
| PM155 | 1988 | GMACH | TRIMMER | SM EQUIP |
| PM157 | 1988 | GMACH | TRIMMER | SM EQUIP |
| PM158 | 1988 | GMACH | TRIMMER | SM EQUIP |
| PM159 | 1988 | GMACH | TRIMMER | SM EQUIP |
| PM160 | 1990 | GMACH | TRIMMER | SM EQUIP |
| PM161 | 1990 | GMACH | TRIMMER | SM EQUIP |
| PM162 | 1990 | GMACH | TRIMMER | SM EQUIP |
| PM163 | 1990 | GMACH | TRIMMER | SM EQUIP |
| PM164 | 1990 | GMACH | TRIMMER | SM EQUIP |
| PM165 | 1990 | GMACH | TRIMMER | SM EQUIP |
| PM166 | 1990 | GMACH | TRIMMER | SM EQUIP |
| PM167 | 1990 | GMACH | TRIMMER | SM EQUIP |
| PM168 | 1990 | GMACH | TRIMMER | SM EQUIP |
| PM169 | 1990 | GMACH | TRIMMER | SM EQUIP |
| PM170 | 1990 | GMACH | TRIMMER | SM EQUIP |
| PM171 | 1992 | STIHL | FS86 | SM EQUIP |
| PM172 | 1992 | STIHL | FS86 | SM EQUIP |
| PM173 | 1993 | STIHL | FS86 | SM EQUIP |
| PM174 | 1993 | STIHL | FS86 | SM EQUIP |
| PM175 | 1993 | STIHL | FS86 | SM EQUIP |

Attachment B- Vehicle and Equipment Inventory

Request for Proposals # 10-1658-PES

600 NE Grand Ave.
Portland, OR 97232-2736
(503) 797-1700

| EQ # | Year | Make | Model | Class |
|-------|------|------------------|--------------|------------------------|
| PM176 | 1993 | STIHL | TRIMMER | SM EQUIP |
| PM176 | 1993 | STIHL | | TRIMMER |
| PM177 | 1993 | STIHL | TRIMMER | SM EQUIP |
| PM200 | 2000 | NEW HOLLAND | TN55D | PM WHEEL TRACTOR |
| PM202 | 2006 | JD | 4120 TRACTOR | PM WHEEL TRACTOR |
| PM203 | 1994 | JAKE | HR-15 | GANG MOWER |
| PM204 | 1977 | JD | TRACK LOADER | PM TRACTOR/LOADER |
| PM205 | 1979 | IH | TD7 | PM TRACTOR/LOADER |
| PM206 | 1996 | JAKE | HR5111 | GANG MOWER |
| PM207 | 1992 | CASE | 580 SUPER K | PM WHEEL TRACTOR |
| PM208 | 2006 | JD | 4120 TRACTOR | PM TRACTOR/LOADER |
| PM209 | 1990 | PARKE | PV8708-K-T | SM EQUIP |
| PM210 | 1977 | PARKE | LEAF BLOWER | SM EQUIP |
| PM211 | 1975 | PARKE | LEAF BLOWER | SM EQUIP |
| PM212 | 1999 | NEWH | TN65S | PM WHEEL TRACTOR |
| PM213 | 2002 | SWEEPSTER | | broom attachment |
| PM215 | 1986 | SUNSHINE 21 inch | | mower |
| PM216 | 1988 | RYAN | OVERSEEDER | SM EQUIP |
| PM217 | 1987 | JD | LOG SPLITTER | LOG SPLITTER |
| PM219 | 1993 | JD | 21INCH | SM EQUIP |
| PM220 | 2002 | JD | 4610 | PM WHEEL TRACTOR |
| PM221 | 1990 | JD | 14PB | SM EQUIP |
| PM222 | 2002 | JD | 1435 | PM 72 INCH MOWERS |
| PM225 | 2002 | JD | 1445 | PM 72 INCH MOWERS |
| PM226 | 2002 | JD | 1445 | PM 61 INCH FLAIL MOWER |
| PM227 | 1990 | PROMARK | 942001 | SM EQUIP |
| PM228 | 1973 | TORO | 31-ROTARY | Mower |
| PM229 | 2003 | JD | 4410 | PM WHEEL TRACTOR |
| PM232 | 1998 | JAKE | TURFCAT 523D | PM 72 INCH MOWERS |
| PM235 | 2004 | JAKE | TURFCAT 628 | PM 72 INCH MOWERS |
| PM236 | 2004 | JAKE | TURFCAT 628 | PM 72 INCH MOWERS |
| PM237 | 2004 | JAKE | TURFCAT 628 | PM 72 INCH MOWERS |
| PM240 | 1990 | STIHL | HS60AVEZ | Chainsaw |
| PM241 | 1990 | STIHL | HS60AVEZ | Chainsaw |
| PM242 | 2003 | JAKE | TURFCAT 628 | PM 72 INCH MOWERS |
| PM243 | 2003 | JAKE | TURFCAT 628 | PM 72 INCH MOWERS |
| PM246 | 2007 | JD | 1435 II | PM 72 INCH MOWERS |
| PM247 | 2007 | JD | 1435 II | PM 72 INCH MOWERS |
| PM248 | 2007 | JD | 1435 II | PM 72 INCH MOWERS |

Attachment B- Vehicle and Equipment Inventory Request for Proposals # 10-1658-PES

600 NE Grand Ave.
Portland, OR 97232-2736
(503) 797-1700

| EQ # | Year | Make | Model | Class |
|-------|------|-------------|--------------|---------------|
| PM251 | 1986 | ELOAD | TRAILER | TRAILER |
| PM253 | 1983 | Homelite | SUPEREZ | SM EQUIP |
| PM254 | 1979 | NONE | OUTBOARD MTR | SM EQUIP |
| PM255 | 1967 | ONAN | GENERATOR | GENERATOR |
| PM256 | 1980 | Homelite | XL12 | SM EQUIP |
| PM257 | 1964 | ONAN | 110 | SM EQUIP |
| PM258 | 1994 | HONDA | 750W-AC | SM EQUIP |
| PM262 | 1985 | Homelite | 410 | SM EQUIP |
| PM263 | 1985 | Homelite | 550 | SM EQUIP |
| PM264 | 1982 | Homelite | XL360 | SM EQUIP |
| PM266 | 1990 | Homelite | CHAINSAW | CHAINSAW |
| PM267 | 1983 | Homelite | SUPEREZ | SM EQUIP |
| PM268 | 1990 | Homelite | CHAINSAW | CHAINSAW |
| PM269 | 1990 | Homelite | CHAINSAW | CHAINSAW |
| PM270 | 1987 | MIGHT | SPRAYER | SM EQUIP |
| PM281 | 1977 | ONAN | GENERATOR | SM EQUIP |
| PM284 | 1977 | SUPCT | CONCRETE SAW | SM EQUIP |
| PM286 | 1978 | MCLAN | EDGER | SM EQUIP |
| PM289 | 1978 | MCLAN | EDGER | SM EQUIP |
| PM290 | 1994 | RAYCO | RG1635A | TLR MTD EQUIP |
| PM291 | 1974 | HMLTE | VIBRATOR | SM EQUIP |
| PM293 | 1977 | DIXIE | CEMENT MIXER | SM EQUIP |
| PM294 | 1967 | HOWD | 24INCH | SM EQUIP |
| PM295 | 1998 | BANDT | 150XP | TLR MTD EQUIP |
| PM296 | 1975 | DAVIS | TRENCHER | SM EQUIP |
| PM297 | 1997 | BRUSHBANDIT | 100 | TLR MTD EQUIP |
| PM298 | 1992 | HALE | FIRE PUMP | SM EQUIP |
| PM299 | 1975 | MILR | WELDER | SM EQUIP |
| PM300 | 1964 | HOWD | 48INCH | SM EQUIP |
| PM301 | 1982 | TROY | H-80 | SM EQUIP |
| PM302 | 1998 | ASSEMBLED | TRAILER | TRAILER |
| PM302 | 1998 | ASSEMBLED | | TRAILER |
| PM303 | 1986 | ELOAD | TRAILER | TRAILER |
| PM304 | 1964 | Home MADE | UTIL TRAILER | TRAILER |
| PM305 | 1964 | Home MADE | UTIL TRAILER | TRAILER |
| PM306 | 1964 | Home MADE | UTIL TRAILER | TRAILER |
| PM307 | 1977 | SNOCO | 20015 | TRAILER |
| PM308 | 2004 | CHARMAC | TRAILER | TRAILER |
| PM309 | 2006 | TRAILMAX | TRAILER | TRAILER |

Attachment B- Vehicle and Equipment Inventory Request for Proposals # 10-1658-PES

600 NE Grand Ave.
Portland, OR 97232-2736
(503) 797-1700

| EQ # | Year | Make | Model | Class |
|-------|------|-----------------|--------------|-----------|
| PM310 | 2001 | BIG TEX 35SA-12 | | TRAILER |
| PM311 | 1990 | TUBTT | TUB TOTER | TRAILER |
| PM312 | 2002 | TRAIL EZE | TRAILER | TRAILER |
| PM313 | 2002 | TRAIL EZE | TRAILER | TRAILER |
| PM314 | 1966 | WALAC | CLORINATOR | SM EQUIP |
| PM315 | 1973 | BOSWH | BOAT | SM EQUIP |
| PM316 | 1968 | SEARS | BOAT | SM EQUIP |
| PM317 | 1963 | SEARS | BOAT | SM EQUIP |
| PM318 | 1974 | CITAT | STEAMCLEANER | SM EQUIP |
| PM319 | 1976 | SNOCO | FLATBED | TRAILER |
| PM320 | 1973 | BOGAN | C50 | SM EQUIP |
| PM321 | 1973 | NONE | SUBMERS PUMP | SM EQUIP |
| PM322 | 1969 | WEAVR | WA73 JACK | SM EQUIP |
| PM323 | 2002 | TRAILMAX | TRAILER | TRAILER |
| PM324 | 1969 | AIRCO | 840 TORCH | SM EQUIP |
| PM325 | 1974 | BALDE | 8-ELECTRIC | SM EQUIP |
| PM326 | 1970 | BELCO | WATER TANK | SM EQUIP |
| PM327 | 1971 | DURAF | SPRING BOARD | SM EQUIP |
| PM329 | 1983 | CR | TRAILER | TRAILER |
| PM330 | 1984 | CR | TRAILER | TRAILER |
| PM332 | 1975 | ROGER | 595 | SM EQUIP |
| PM333 | 1993 | JD | TURF 269TER | SM EQUIP |
| PM334 | 1976 | MERC | PIPE LOCATOR | SM EQUIP |
| PM335 | 1993 | RYAN | LA-28 TURF A | SM EQUIP |
| PM336 | 2006 | PJ TRAILERS | TRAILER | TRAILER |
| PM337 | 1982 | CR | TRAILER | TRAILER |
| PM339 | 1977 | TORNA | 98800 VACUUM | SM EQUIP |
| PM348 | 1978 | RYAN | SOD CUTTER | SM EQUIP |
| PM353 | 1968 | LELY | SPREADER | SM EQUIP |
| PM355 | 1979 | CHICA | DRILL PRESS | SM EQUIP |
| PM356 | 1987 | CAMPB | VT6120 | SM EQUIP |
| PM357 | 1979 | DAYTN | 10CU TRAILER | TRAILER |
| PM358 | 1964 | MARLO | GENERATOR | GENERATOR |
| PM359 | 1979 | STIHL | NONE | SM EQUIP |
| PM360 | 1994 | STIHL | 34 | SM EQUIP |
| PM361 | 1998 | STIHL | 026 PRO | SM EQUIP |
| PM363 | 1999 | STIHL | 66 | SM EQUIP |
| PM400 | 1994 | FLYMO | HP400KIBA | SM EQUIP |



Attachment C – Personal Services Agreement Request for Proposals # 10-1658-PES

600 NE Grand Ave.
Portland, OR 97232-2736
(503) 797-1700

CONTRACT NO. _____

THIS AGREEMENT is between Metro, a metropolitan service district organized under the laws of the State of Oregon and the Metro Charter, located at 600 N.E. Grand Avenue, Portland, OR 97232-2736, and _____, referred to herein as "Contractor," located at _____.

In exchange for the promises and other consideration set forth below, the parties agree as follows:

1. Duration. This personal services agreement shall be effective _____ and shall remain in effect until and including _____, unless terminated or extended as provided in this Agreement.

2. Scope of Work. Contractor shall provide all services and materials specified in the attached "Exhibit A -- Scope of Work," which is incorporated into this Agreement by reference. All services and materials shall be provided by Contractor in accordance with the Scope of Work, in a competent and professional manner. To the extent that the Scope of Work contains additional contract provisions or waives any provision in the body of this Agreement, the Scope of Work shall control.

3. Payment. Metro shall pay Contractor for services performed and materials delivered in the amount(s), manner and at the time(s) specified in the Scope of Work for a maximum sum not to exceed _____ AND _____/100THS DOLLARS (\$_____).

4. Insurance.

a. Contractor shall purchase and maintain at the Contractor's expense, the following types of insurance, covering the Contractor, its employees, and agents:

(1) Broad form comprehensive general liability insurance covering bodily injury and property damage, with automatic coverage for premises, operations, and product liability, shall be a minimum of \$1,000,000 per occurrence. The policy must be endorsed with contractual liability coverage; and

(2) automobile bodily injury and property damage liability insurance coverage shall be a minimum of 1,000,000 per occurrence.

b. Metro, its elected officials, departments, employees, and agents shall be named as ADDITIONAL INSUREDS. Notice of any material change or policy cancellation shall be provided to Metro 30 days prior to the change or cancellation.

c. Contractor, its subcontractors, if any, and all employers working under this Agreement that are subject employers under the Oregon Workers' Compensation Law shall comply with ORS 656.017, which requires them to provide Workers' Compensation coverage for all their subject workers. Contractor shall provide Metro with certification of Workers' Compensation insurance including employer's liability. If Contractor has no employees and will perform the work without the assistance of others, a certificate to that effect may be attached, as Exhibit B, in lieu of the certificate showing current Workers' Compensation.

d. If required by the Scope of Work, Contractor shall maintain for the duration of this Agreement professional liability insurance covering personal injury and property damage arising from errors, omissions, or malpractice. Coverage shall be in the minimum amount of \$500,000. Contractor shall provide to Metro a certificate of this insurance, and 30 days' advance notice of material change or cancellation.

e. Contractor shall provide Metro with a Certificate of Insurance complying with this article, and naming Metro as an additional insured within fifteen (15) days of execution of this contract, or twenty-four (24) hours before services under this contract commence, whichever date is earlier.

Attachment C – Personal Services Agreement Request for Proposals- #10-1658-PES

5. Indemnification. Contractor shall indemnify and hold Metro, its agents, employees and elected officials harmless from any and all claims, demands, damages, actions, losses and expenses, including attorney's fees, arising out of or in any way connected with its performance of this Agreement, or with any patent infringement or copyright claims arising out of the use of Contractor's designs or other materials by Metro and for any claims or disputes involving subcontractors.
6. Maintenance of Records. Contractor shall maintain all of its records relating to the Scope of Work on a generally recognized accounting basis and allow Metro the opportunity to inspect and/or copy such records at a convenient place during normal business hours. All required records shall be maintained by Contractor for six years after Metro makes final payment and all other pending matters are closed.
7. Ownership of Documents. All documents of any nature including, but not limited to, reports, drawings, works of art and photographs, produced by Contractor pursuant to this Agreement are the property of Metro, and it is agreed by the parties that such documents are works made for hire. Contractor hereby conveys, transfers, and grants to Metro all rights of reproduction and the copyright to all such documents.
8. Project Information. Contractor shall share all project information and fully cooperate with Metro, informing Metro of all aspects of the project including actual or potential problems or defects. Contractor shall abstain from releasing any information or project news without the prior and specific written approval of Metro.
9. Independent Contractor Status. Contractor shall be an independent contractor for all purposes and shall be entitled only to the compensation provided for in this Agreement. Under no circumstances shall Contractor be considered an employee of Metro. Contractor shall provide all tools or equipment necessary to carry out this Agreement, and shall exercise complete control in achieving the results specified in the Scope of Work. Contractor is solely responsible for its performance under this Agreement and the quality of its work; for obtaining and maintaining all licenses and certifications necessary to carry out this Agreement; for payment of any fees, taxes, royalties, or other expenses necessary to complete the work except as otherwise specified in the Scope of Work; and for meeting all other requirements of law in carrying out this Agreement. Contractor shall identify and certify tax status and identification number through execution of IRS form W-9 prior to submitting any request for payment to Metro.
10. Right to Withhold Payments. Metro shall have the right to withhold from payments due to Contractor such sums as necessary, in Metro's sole opinion, to protect Metro against any loss, damage, or claim which may result from Contractor's performance or failure to perform under this Agreement or the failure of Contractor to make proper payment to any suppliers or subcontractors.
11. State and Federal Law Constraints. Both parties shall comply with the public contracting provisions of ORS chapters 279A, 279B and 279C and the recycling provisions of ORS 279B.025 to the extent those provisions apply to this Agreement. All such provisions required to be included in this Agreement are incorporated herein by reference. Contractor shall comply with all applicable requirements of federal and state civil rights and rehabilitation statutes, rules and regulations including those of the Americans with Disabilities Act.
12. Situs. The situs of this Agreement is Portland, Oregon. Any litigation over this agreement shall be governed by the laws of the State of Oregon and shall be conducted in the Circuit Court of the state of Oregon for Multnomah County, or, if jurisdiction is proper, in the U.S. District Court for the District of Oregon.
13. Assignment. This Agreement is binding on each party, its successors, assigns, and legal representatives and may not, under any circumstance, be assigned or transferred by either party.



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Attachment C – Personal Services Agreement Request for Proposals- #10-1658-PES

14. Termination. This Agreement may be terminated by mutual consent of the parties. In addition, Metro may terminate this Agreement by giving Contractor seven days prior written notice of intent to terminate, without waiving any claims or remedies it may have against Contractor. Termination shall not excuse payment for expenses properly incurred prior to notice of termination, but neither party shall be liable for indirect or consequential damages arising from termination under this section.

15. No Waiver of Claims. The failure to enforce any provision of this Agreement shall not constitute a waiver by Metro of that or any other provision.

16. Modification. Notwithstanding and succeeding any and all prior agreement(s) or practice(s), this Agreement constitutes the entire Agreement between the parties, and may only be expressly modified in writing(s), signed by both parties.

By _____
Title _____
Date _____

METRO
By _____
Title _____
Date _____

Appendix 1

Request for Proposals # 10-1658-PES

APPENDIX 1

- 1.1 Metro IS Standards
- 1.2 Vendor Profile
- 1.3 Application System Profile
- 1.4 Application System Requirements
- 1.5 Implementation and Training Plan
- 1.6 Service and Maintenance Profile
- 1.7 Support Systems Profile
- 1.8 Cost Form

FLEET MANAGEMENT SOFTWARE

Request for Proposals #10-1658-PES

Metro IS Standards, Appendix 1.1

600 NE Grand Ave.
 Portland, OR 97232-2736
 (503) 797-1700

APPENDIX 1.1

| METRO IS STANDARDS | |
|--|--|
| Timekeeping System | Kronos 6.1 |
| Learning Management System (LMS) | Meridian Global 2.4 |
| Financial System | PeopleSoft 9.0 Tools 8.48: General Ledger, Accounts Payable, Purchasing, Accounts Receivable, Billing, Assets |
| Human Resource Management System (HRMS) | PeopleSoft 8.9 Tools 8.47 (upgrading to version 9.1, Tools 8.50, 4 th quarter 2010): Base Benefits, Human Resources, Payroll |
| Supporting Software | Merant's Micro Focus Net Express version 5 Cobol Compiler; Java 1.5; Tuxedo 8.1 |
| Reporting | Crystal Reports 9.0 |
| WebServer | WebLogic 8.1; MS/IIS version 6.0 |
| Database(s) | Oracle 10g (PeopleSoft, Kronos); SQL Server 2008 (LMS, Sharepoint); MySQL (Home grown applications) |
| Desktop, Workstation, Operating Systems | Microsoft Windows XP, 7; Mac OS 10.6 |
| Desktop / Notebook | PC, Mac |
| Office Applications | Office 2003, 2007; Sharepoint MOSS 2007 |
| Email Groupware Server | Microsoft Exchange Server 2003 |
| Email Client Software | Outlook 2007 |
| Web Browser | Microsoft Internet Explorer 7, 8; Safari 4.0 |
| PDF reader | Adobe Reader |
| Application Development Programming language for information application | Coldfusion |
| Network Protocols | TCPIP |

FLEET MANAGEMENT SOFTWARE

Request for Proposals #10-1658-PES

Vendor Profile, Appendix 1.2

APPENDIX 1.2

Company Name:

Street Address:

City:

State:

Zip:

Year Founded:

Ownership (public, private, employee owned, etc.):

Number of employees:

Primary Product/Service:

Other Products/Services:

Contacts

Primary

Name:

Title:

Street Address:

City:

State:

Zip:

Secondary

Name:

Title:

Street Address:

City:

State:

Zip:

FLEET MANAGEMENT SOFTWARE

Request for Proposals #10-1658-PES

Vendor Profile, Appendix 1.2

1. Describe your experience in implementing Fleet Management Systems similar to the one proposed.
2. Describe your company's policy on Research and Development:
 - a. What percent of your company's budget is allocated to research and development?
 - b. How does your firm identify and prioritize research and development projects?
3. For the proposed system, detail the location and number of staff dedicated to:
 - a. Development
 - b. Technical support
 - c. End user support

FLEET MANAGEMENT SOFTWARE

Request for Proposals #10-1658-PES

Application System Profile, Appendix 1.3

APPENDIX 1.3

System Name:

Vendor:

1. Date of first installation:
2. Number installed Worldwide:
3. Terms of ownership (check applicable):

Software owned by user _____

Software licensed to user _____

Subscription to on-line service _____

Other (please describe) _____

4. Implementation Details: specify if hosted by Metro

Language and/or CASE tools used (include vendor and version):

Databases used (list all supported include vendor and version):

Operating systems (list all supported include vendor and version):

Hardware (list all platforms and vendors supported):

Associated tools and utilities:

5. Is the application system based on a standard version released to all customers?
6. Describe your systems ability to follow W3C accessibility guidelines and section 508 standards for government agencies.

FLEET MANAGEMENT SOFTWARE

Request for Proposals #10-1658-PES

Application System Profile, Appendix 1.3

7. Are custom modifications possible? If so, how are they accommodated?
8. Describe your system's compatibility with Metro workstation operating systems, browser versions and Office products identified in Appendix 1.1.
9. Describe the structure and function of your application's security system.
10. Describe provisions for branding the system for consistency with Metro's internal website.
11. FOR VENDOR HOSTED SYSTEMS ONLY: Describe your business continuity and disaster recovery plans for restoring service to your on-line users in the event of a disaster at your physical location.

FLEET MANAGEMENT SOFTWARE

Request for Proposals #10-1658-PES

Application System Profile, Appendix 1.3

References

Agency/Company Name:

Street Address:

City:

State:

Zip:

Contact Name:

Contact Phone:

Go-Live Date:

Database/Version:

Fleet Size:

Agency/Company Name:

Street Address:

City:

State:

Zip:

Contact Name:

Contact Phone:

Go-Live Date:

Database/Version:

Fleet Size:



FLEET MANAGEMENT SOFTWARE

Request for Proposals #10-1658-PES

Application System Requirements, Appendix 1.4

600 NE Grand Ave.
Portland, OR 97232-2736 (503) 797-1700

APPENDIX 1.4

| | Requirements | Mandatory/ Optional Element | Basic Package | Customization | Additional Fee per unit? | Not Available | Comments |
|---------------------------------|---|-----------------------------------|------------------|---------------|--------------------------------|------------------|----------|
| 1. Asset Management | | | | | | | |
| 1.1 | Allow identification and management of under/over utilized vehicles/equipment | M | | | | | |
| 1.2 | Life cycle costing and rate assignment by vehicle or equipment | M | | | | | |
| 1.3 | Accident and claim assignment by vehicle/equipment and employee | M | | | | | |
| 1.4 | Monthly, yearly, life to date costing by vehicle and equipment | M | | | | | |
| 1.5 | Budgeting, acquisition planning by asset, assignment of asset tracking numbers | M | | | | | |
| 1.6 | License and permit management by vehicle and employee | M | | | | | |
| 1.7 | Vehicle retirement and record management for a minimum of 5 years | M | | | | | |
| 1.8 | Ability to add temporary fields for replacement or seasonal vehicles | M | | | | | |
| 1.9 | Ability to add or update condition reports for individual vehicles or equipment with descriptions, notes and pictures | M | | | | | |
| 2. Equipment Replacement | | | | | | | |

FLEET MANAGEMENT SOFTWARE

Request for Proposals #10-1658-PES

Application System Requirements, Appendix 1.4

600 NE Grand Ave.
Portland, OR 97232-2736 (503) 797-1700

| | Requirements | Mandatory/ Optional Element | Basic Package | Customization | Additional Fee per unit? | Not Available | Comments |
|--|--|-----------------------------------|------------------|---------------|--------------------------------|------------------|----------|
| 2.1 | Track depreciation and renewal by miles, years or hours and by vehicle or equipment | M | | | | | |
| 3. Motor Pool Scheduling | | | | | | | |
| 3.1 | Reservation capability for vehicles (limited employee sub-groups, ability to partition the population of vehicles and equipment) | M | | | | | |
| 3.2 | Provide a visual interface showing all vehicles' availability, length of reservation and destination | M | | | | | |
| 3.3 | Ability to interface with Outlook for scheduling purposes | M | | | | | |
| 3.4 | Ability to interface with Peoplesoft | O | | | | | |
| 3.5 | Provide ability to link in pool scheduling with maintenance and out of service flags | M | | | | | |
| 3.6 | Ability to accommodate all 750 employees within the system | M | | | | | |
| 3.7 | Ability to require users to input mileage and department ID numbers and provide a flag to fleet manager if not completed | M | | | | | |
| 4. Data Entry and System Creation | | | | | | | |
| 4.1 | Provide services to enter data by vehicle and equipment to populate the system | O | | | | | |
| 4.2 | Provide canned maintenance intervals and work packages by vehicle class and type | O | | | | | |



FLEET MANAGEMENT SOFTWARE

Request for Proposals #10-1658-PES

Application System Requirements, Appendix 1.4

600 NE Grand Ave.
Portland, OR 97232-2736 (503) 797-1700

| | Requirements | Mandatory/ Optional Element | Basic Package | Customization | Additional Fee per unit? | Not Available | Comments |
|-----|--|-----------------------------------|------------------|---------------|--------------------------------|------------------|----------|
| 4.3 | Ability to manually input service and warranty information and set up flags to alert fleet administrator | M | | | | | |
| 4.4 | Ability to set up and create fields required for tracking and Metro site branding | M | | | | | |
| 4.5 | Ability to track accessory equipment that is tied to specific assets | M | | | | | |
| | 5. Periodic Maintenance and Warranty Track | | | | | | |
| 5.1 | Periodic maintenance tracking by vehicle and equipment | M | | | | | |
| 5.2 | Periodic maintenance work order scheduling vehicle user and contractor | M | | | | | |
| 5.3 | Warranty tracking by vehicle and equipment | M | | | | | |
| 5.4 | Warranty work order scheduling with vehicle user and contractor | M | | | | | |
| 5.5 | Email notification to users and contractors for periodic maintenance, warranty, licensing etc. | M | | | | | |
| | 6. Fuel Consumption and Tracking | | | | | | |
| 6.1 | Voyager card data upload (manual or automatic) | M | | | | | |
| 6.2 | Card lock system upload (Petrovend) from Blue Lake and Oxbow Regional Park and Oregon Zoo | M | | | | | |



FLEET MANAGEMENT SOFTWARE

Request for Proposals #10-1658-PES

Application System Requirements, Appendix 1.4

600 NE Grand Ave.
Portland, OR 97232-2736 (503) 797-1700

| | Requirements | Mandatory/ Optional Element | Basic Package | Customization | Additional Fee per unit? | Not Available | Comments |
|-----|--|-----------------------------------|------------------|---------------|--------------------------------|------------------|----------|
| | Facilities | | | | | | |
| 6.3 | Provide GPS tracking capability | O | | | | | |
| 6.4 | Provide card swiper access capability for key access | O | | | | | |
| 6.5 | Provide idling time tracking on selected vehicles | O | | | | | |
| | 7. Maintenance Requests | M | | | | | |
| 7.1 | Allow operators to alert fleet manager regarding maintenance concerns and track by vehicle | M | | | | | |
| | 8. Reporting | | | | | | |
| 81. | Allow reporting by vehicle, department, sub-pools and categories (fuel, maintenance and by type, costs by vehicle and equipment, etc.) | M | | | | | |

FLEET MANAGEMENT SOFTWARE

Request for Proposals #10-1658-PES

Implementation and Training Plan, Appendix 1.5

APPENDIX 1.5

System Name:

Vendor:

1. Identify implementation project deliverables. These must address the requirements set forth in Section III Proposed Scope of Work/Schedule.

2. Provide a project timeline identifying dates for deliverables. This timeline should take into consideration the purchase of any hardware and off-site training of Metro staff.

3. Describe the role of Metro staff in the implementation and the corresponding time commitment.

4. Describe the Vendor's role in the implementation project. Estimate the number of hours.

5. Provide resumes of key vendor staff who will be assigned to the implementation project. State the role of each member of the team.

6. Describe the methodology to be used for:
 - a. Communicating project status
 - b. Tracking project issues
 - c. Managing change.

FLEET MANAGEMENT SOFTWARE

Request for Proposals #10-1658-PES

Implementation and Training Plan, Appendix 1.5

7. Indicate the Information Systems staff and their roles required to maintain and operate your system.

8. For each staff member identified in questions 7 and 8 above, describe the training required to use, operate and administer the system. This should address the needs of employees (on-line tutorials), fleet manager, administrators, etc.

9. For each training, identify:
 - The subject of the training class
 - The intended audience
 - Where the training is held
 - The nature of the training such as in-house, web based, classroom, etc.
 - Materials, texts and/or equipment required for the training
 - The per student cost of the training.

10. Identify the number of training units, if any, included with the Fleet Management Software acquisition.

FLEET MANAGEMENT SOFTWARE

Request for Proposals #10-1658-PES

Service and Maintenance Profile, Appendix 1.6

APPENDIX 1.6

System Name:

Vendor:

1. Warranty

Please state the length of the warranty period for the proposed software.

2. Hotline Support and Problem Resolution

- a. Describe the hot line support you provide.
- b. What hours (Pacific Standard Time) is the hotline available?
- c. How do users log problems on the hotline?
- d. What is the guaranteed response time to issues that have halted normal operations at the customer site?
- e. What is the guaranteed response time to non-fatal issues?
- f. On what basis are hotline calls charged (per call, unlimited with maintenance contract, etc.)

3. System Enhancement

- a. How frequent are enhancement releases of the application system?
- b. Is updated documentation included with release?
- c. How are custom modifications retained across releases?
- d. Describe your quality assurance program that ensures compatibility with earlier releases?
- e. When you produce new releases, do you ever remove the functionality of earlier versions?

4. User Group

- a. Is there a user group organized for your system?
- b. Is the group vendor independent?
- c. Year the user group was established:
- d. Number of members:
- e. Describe the organizational structure of the user group:
- f. Cost of membership:

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Service and Maintenance Profile, Appendix 1.6

- g. Meetings
 - i. How frequently are meetings held?
 - ii. Where are meetings held?
 - iii. What is the cost of attendance at meetings?
- h. On-Line Organization
 - i. Is there an on-line user group?
 - ii. What is the membership requirement?
 - iii. Year the user group was established:
 - iv. Number of users:

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Support Systems Profile, Appendix 1.7

600 NE Grand Ave.
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 (503) 797-1700

APPENDIX 1.7

Client Hosted

Typical Configuration:

The following combination of hardware, operating system and database supports the Fleet Management System. Include information for your recommended physical environment (i.e. web server, application server, database server configurations for both production and test environments). Costs of the elements listed below are stated on the Cost Form (Appendix 1.8).

Hardware:

| | | |
|----------------------------------|--------|-----------------------|
| Processor: | | Number of processors: |
| Memory Size (GB): | | Maximum: |
| On-line High Speed Storage (GB): | | Maximum: |
| On-line Low Speed Storage (GB): | | Maximum: |
| Off-line Storage for backup: | Media: | Capacity: |

Operating System and Related Utilities:

| | |
|-------------|--|
| Name of OS: | |
| Version: | |

Database:

| | |
|-------------------|--|
| Name of Database: | |
| Version: | |

Other Support System Elements, required Third-Party software and/or tools:

| <u>Item</u> | <u>Vendor</u> |
|-------------|---------------|
| | |
| | |
| | |

Sizing Assumptions:

State all assumptions made in sizing the typical configuration for use at Metro.

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Support Systems Profile, Appendix 1.7

Vendor Hosted

Application Requirements:

Certified Operating Systems (i.e. Windows XP, Mac OS 10.6, etc):

Required Workstation Installed Software (i.e. Java 1.5, Abode Flash Player 10.0, etc):

Supported Browsers (i.e. Internet Explorer 7.0, Safari 4.0, etc):

Supported Software (i.e. Office 2007, Adobe Acrobat Reader 6.0, etc):

Frequency of Application Updates/Associated Downtime:

File Transfer Format (i.e. comma delimited (.CSV) file, etc):

Security:

| | Available | Not Available | Comments |
|----------------------------------|------------------|----------------------|-----------------|
| SSL Data Encryption | | | |
| Physical Security | | | |
| System Redundancy | | | |
| Perimeter Defense | | | |
| Data Security | | | |
| Back-ups (Off-site Facility?) | | | |
| User Authentication | | | |
| Operating System Security | | | |

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Support Systems Profile, Appendix 1.7

Test Environment:

Initial Setup:

24 Hour Access:

Refresh Frequency, Format, Cost:

Application Updates:

Backups:

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Cost Form, Appendix 1.8



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APPENDIX 1.8

COST FORM

Application \$ _____

Support Systems \$ _____

Implementation \$ _____

Maintenance and Support/and or Licensing Structure*

 Year 1 \$ _____

 Year 2 \$ _____

 Year 3 \$ _____

 Year 4 \$ _____

 Year 5 \$ _____

Total Five Year Cost \$ _____

Other services: \$ _____/hour

Modification Cost (identify basis i.e. hourly rate, per change) \$ _____/hour

Training (identify basis i.e., per user and system admin.) \$ _____/unit

Alternative #1: GPS Tracking & Vehicle Swiper Entry System \$ _____

*Describe charges by users and vehicle

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