



**PHILADELPHIA GAS WORKS**

**REQUEST FOR PROPOSALS**

**FOR**

**Fleet Management Software Solution**

Dated: October 7, 2013

RFP NO.: **28020**

**Philadelphia Gas Works – Request For Proposals  
Fleet Management Software Solution**

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## **1 The Solicitation – Notice to Proposers**

Notice is hereby given that Philadelphia Gas Works (“PGW”) will receive sealed proposals on or before **Friday, October 24, 2013, 2:30 p.m.** Eastern Time, at the PGW Supply Chain Department, 800 W. Montgomery Avenue, Philadelphia, Pennsylvania 19122, for a vendor to provide a fleet management software package.

This document outlines PGW’s objectives, describes the general characteristics of the services to be provided, and (without being exhaustive) outlines the principal obligations of PGW and the selected Proposer.

Questions concerning this Request for Proposals shall be directed in writing towards Erica Patterson, PGW Supply Chain Department, e-mail: [Erica.Patterson@pgworks.com](mailto:Erica.Patterson@pgworks.com), with a copy to [procurement@pgworks.com](mailto:procurement@pgworks.com) or PGW Supply Chain Department, 800 W. Montgomery Avenue, Philadelphia, Pennsylvania 19122. **Proposers may not contact other PGW personnel regarding this RFP.**

### **1.1 Schedule of Events**

The projected schedule of events for this Request for Proposals is as follows:

Issue Date of the RFP .....	October 7, 2013
Questions and requests for clarification or information must be received, in writing, at the office of the person listed above by 5 p.m. (EST) .....	October 14, 2013
Mandatory Telephone Conference, 10:00 a.m. ....	October 16, 2013
Proposal Submission Due Date Must be received, in writing, at the office of the person listed above by 2:30 p.m. (EST) .....	October 24, 2013
Notification Date.....	November 5, 2013
Contract Start Date (on or before).....	November 12, 2013

The Mandatory Telephone Conference is scheduled for 10:00 a.m. on October 16, 2013 to answer questions and requests for clarification. **The dial-in number is as follows: 1-888-330-1716. The participant access code is 6028421.** Vendors are advised to phone in 5 minutes prior to the meeting start time.

These dates are estimates only and PGW reserves the right to alter this schedule as it deems necessary or appropriate.

## **1.2 Proposal Requirements**

Proposals shall be accepted only from respondents (“Proposers”) who have:

- 1.2.1 Obtained from PGW a complete set of Proposal Documents and any addenda thereto issued by PGW (sometimes referred to as the “RFP”), consisting of the following five (5) sections and three (3) attachments:

***Sections:***

- 1 The Solicitation – Notice to Proposers
- 2 Project Definitions and Requirements
- 3 Instructions to Proposers
- 4 Proposer Information
- 5 Proposal Evaluation, Negotiation and Contract Award

***Attachments:***

- C Demographic Survey
- D Disclosure Form
- P Detailed Vendor and System Requirements

- 1.2.2 Taken part in the Mandatory Telephone Conference; and

- 1.2.3 Submitted a proposal pursuant to the instructions in this RFP as set forth in Section 3.

In evaluating the proposals, PGW will consider the demonstrated experience and ability of the Proposer to deliver the proposed services, the scope and value of the proposed services, and the financial proposal of each Proposer as described in this RFP.

PGW hereby solicits proposals in accordance with these Proposal Documents.

## **2 Project Definition and Requirements**

### **2.1 Overview of PGW/PGW Fleet**

PGW is a municipally-owned utility operated by the Philadelphia Facilities Management Corporation (hereafter referred to as “PFMC”). The selected Proposer will enter into a negotiated contract with PGW by PFMC. PGW provides natural gas service to approximately 502,000 active accounts within the city of Philadelphia, using 6,000 miles of gas mains and services. PGW is the only utility currently distributing natural gas within the city of Philadelphia, and its mission is to provide, safe, reliable, natural gas service to the citizen of Philadelphia at a reasonable cost.

PGW currently operates a total fleet of 898 vehicles and pieces of equipment, as detailed on Attachment A. The Fleet Operations Department (“Fleet”) maintains this large array of vehicles and equipment, varying from mid-size sedans to utility vans to backhoe loaders. Through the use of the current software solution Fleet creates work orders, develops preventative maintenance schedules, produces comprehensive reports for other departments in PGW, manages a selection of pool vehicles, etc. to help ensure customer satisfaction throughout the company. Fleet has been utilizing its current management software since 2000 and is seeking new solutions for handling all assets.

This Request for Proposal (RFP) is intended to secure the services of a vendor to implement a new system, migrate the data from old package, and train all applicable users in new package.

### **2.2 Scope of Work**

- 2.2.1 PGW is seeking proposals for a vendor to implement a new software package for fleet management solutions. The selected proposer will provide these services for PGW’s Fleet Operations Department including, but not limited to: The vendor shall provide an advanced fleet management software solution to assist the Fleet Operations department in managing all active, disabled and retired assets.
- 2.2.2 The vendor shall supply data entry templates to support manual entry of data during data migration, where applicable.
- 2.2.3 The vendor shall provide expected transaction and screen "paint" response times for the proposed system and suggested hardware, software, and connectivity requirements.
- 2.2.4 The system shall be tailored to meet the specific needs of PGW’s fleet operations department through user defined parameters and codes. The system must be completely user definable for all fields in the User Interface including: reports, columns, labor codes (both direct and indirect), calendars (fiscal and otherwise) and user dashboard. The system shall provide graphical user interface (GUI) conforming to industry standards such as Microsoft Application Guidelines.

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- 2.2.5 The system shall be transaction based. Details of each transaction shall provide a clear audit trail for verification and be readily available via a system-generated ad hoc report.
- 2.2.6 The system shall allow data entry editing and validation of data entered by keyboard or other data entry devices. Edits shall include value ranges, formats, required fields, and correct codes.
- 2.2.7 The system shall be capable of capturing all labor transactions in “real time” (as they occur) and allow the use of multiple labor rates, by location (for regular time and overtime) and provide User option for shop rate or employee rate.
- 2.2.8 The system shall be capable of utilizing complete ATA VMRS coding structure.
- 2.2.9 The system shall be capable of recording work performed, parts used, and labor transactions through use of keyboard with appropriate window and/or barcode reading device.
- 2.2.10 The system shall contain a user-friendly ad hoc report writer without using any external reporting tools. It shall have the capability of downloading data and exporting data in ASCII and standard ODBC database formats, including but not limited to Microsoft Access & Excel.
- 2.2.11 The system shall have all modules integrated within itself to the highest possible degree. The operator will not have to log out of one module and into another to move from function to function.
- 2.2.12 The system shall be capable of identifying warranties (for both replacement parts and original equipment components) and tracking the status of claims and reimbursements.
- 2.2.13 The system will be web based and have been in production for over 5 years at over ten (10) customer sites.
- 2.2.14 The system shall support hand held data entry devices capable of recording labor and parts. Data recorded in the hand held device shall be capable of being loaded and processed into the software's database without manual re-keying. Uploading shall not interfere with, and shall be capable of being performed concurrently with, all other routine system functions. Integration of hand held devices should be available at all times, not just at initial set up of system.
- 2.2.15 The system shall support email messaging, attachments to both emails and report formats and allow for mathematical calculations in defined fields.
- 2.2.16 The system will display error messages and prompts when an inappropriate action is performed and provide online/in-system help.
- 2.2.17 The system shall have an alert management feature to highlight abnormal occurrences, defects, or discrepant conditions based on pre-defined parameters.

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2.2.18 The system shall operate in client/server configuration, and the client software shall run on either Windows 2000 or higher. System shall be written in a fourth generation programming language.

2.2.19 The system shall provide security to:

- Prohibit access to data by unauthorized operators.
- Restrict viewing of data for separate location(s)/facility(ies) without appropriate access.
- Establish operator identity for each transaction
- Manage import and export facilities controlled by the built-in security mechanism.
- Maintain detailed system audit trails by user ID.
  - System audit trail data shall be retrievable using the system's ad-hoc report generator, and data retrieval shall be access-protected by the security system.
  - System audit trail data shall not be editable by other functions or software tools included with the system.

### **2.3 Pricing/Payment**

All costs for the proposed solution must be provided, including (without limitation) all hosting fees, conversion and implementation costs and hardware costs.

PGW acknowledges that it may be difficult to propose a fixed price for this RFP because the project involves gathering system requirements and migrating previously established data. For this reason, PGW has not predetermined a pricing structure for this project and will consider all pricing proposals. Pricing can be proposed in a single format or a combination of formats; all prices must clearly indicate the cost of each phase of the effort and be broken down by each discrete module. All additional cost items (such as expenses) should be clearly identified in the pricing proposal.

### **2.4 Licensing**

The Proposer will be authorized to do business in the Commonwealth of Pennsylvania and comply with all pertinent state and federal requirements, codes and regulations.

If Proposer is a "business" as defined in The Philadelphia Code, Section 19-2601, Proposer must have a valid business privilege license, issued by the City of Philadelphia's

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Department of Licenses and Inspections, to do business in the City of Philadelphia, prior to entering into any contract with PGW.

## **2.5 Information/Product**

All reports, surveys, tables, charts, diagrams, design work, product recordings and other data (including electronic, audio and video) or documentation prepared or compiled by Proposer in connection with the performance of its obligations under the contract, shall be the sole and exclusive property of PGW. Proposer shall retain in its files, sufficiently detailed working papers relevant to its engagement with PGW. Proposer further agrees that its working papers will be held in the strictest confidence and will not be disclosed or otherwise made available to outside sources, except as required by law, without the written consent of PGW.

## **2.6 Confidentiality**

Proposer must agree to keep confidential any and all information concerning the plans, operations or activities of PGW which may be divulged by PGW or ascertained by Proposer in the course of performing services under any contract with PGW. In the event Proposer is required to disclose confidential information pursuant to a subpoena, order of a court, or other legal process, Proposer shall, upon notice of such required disclosure and prior to disclosure, immediately notify PGW and allow PGW the opportunity to inspect the information subject to disclosure, and in the event such disclosure is objectionable under any standard or rule of the court, Proposer shall exhaust all legal means to prevent disclosure.

## **2.7 Minority Participation**

PGW has established an anti-discrimination policy relating to the participation of Minority, Women, and Disabled businesses and persons (collectively, "DBEs") in contracts. The purpose of PGW's DBE policy, is to provide equal opportunity for all businesses and persons and to assure that PGW funds are not used, directly or indirectly, to promote, reinforce or perpetuate discriminatory practices. Proposers must complete Attachment C (Demographic Survey), attached hereto and submit same with their proposals.

## **2.8 Insurance**

Proposer shall procure and maintain, at its sole cost and expense, insurance with companies having an A. M. Best's rating of not less than A- and acceptable to PGW, with coverage limits of not less than stipulated below. PGW, PFMC, the City of Philadelphia and their respective officers, employees, directors, boards, commissions and agents, shall be included as Additional Insureds on the Commercial General Liability, Automobile Liability and Excess/Umbrella Liability Insurance policies. An endorsement is required stating that Proposer's policies affording Additional Insured status will be primary to any other coverage available to PGW, PFMC, and the City of Philadelphia and their respective officers, employees, directors, boards, commissions and agents, and any insurance maintained by

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PGW will be excess and non-contributory. No act or omission of PGW, PFMC, and/or the City of Philadelphia and their respective officers, employees, directors, boards, commissions and agents, shall invalidate the coverage.

- Worker's Compensation and Employers Liability. Workers Compensation Insurance as required by statute. Employers Liability coverage to be carried with limits of not less than \$500,000/per accident, \$500,000/disease (policy limit), \$500,000,000/disease (each employee).
- Commercial General Liability. Commercial General Liability Insurance is required with limits of not less than \$1,000,000 for Bodily Injury and Property Damage each occurrence; \$2,000,000 General Aggregate; \$1,000,000 Products/Completed Operations Aggregate and \$1,000,000 Personal/Advertising Injury. The policy shall also cover liability arising from liability assumed under an insured contract (including the tort liability of another assumed in a business contract) and Personal Injury (including coverage for defamation, malicious prosecution, slander and mental anguish). Products and Completed Operations must be included. Such policy must contain a "Severability of Interests" clause. ISO Endorsement CG 21 39 10 93 (Contractual Liability Limitation) shall not apply to this contract. This insurance shall be excess over any other insurance, whether primary, excess, contingent or on any other basis, that is available to the Proposer or any subcontractor covering liability for damages because of Bodily Injury or Property Damage for which the Proposer has been included as an Additional Insured. PGW, PFMC and the City of Philadelphia, and their respective officers, employees, directors, boards, commissions, and agents shall be included as Additional Insureds. A copy of the actual Additional Insured Endorsement(s) or policy wording is required.
- Automobile Liability. Business Automobile Liability covering all owned, non-owned and hired autos is required with limits of not less than \$1,000,000 Combined Single Limit for Bodily Injury and Property Damage. Such policy must contain a "Severability of Interests" clause. PGW, PFMC and the City of Philadelphia, and their respective officers, employees, directors, boards, commissions, and agents shall be included as Additional Insureds. A copy of the actual Additional Insured Endorsement or policy wording is required.
- Excess/Umbrella Liability. Proposer shall provide evidence of Excess/Umbrella Liability Insurance with limits of not less than \$2,000,000 in Any One Claim or Occurrence. The Excess/Umbrella policy shall follow form and be excess of all underlying insurance required by this contract except Professional Liability/Errors & Omissions coverage as outlined below. PGW, PFMC and the City of Philadelphia, and their respective officers, employees, directors, boards, commissions, and agents shall be included as Additional Insureds. A copy of the actual Additional Insured Endorsement is required.
- Professional Liability/Errors & Omissions Coverage. Evidence of Professional Liability/ Errors & Omissions Insurance must also be provided with limits of not less than \$1,000,000 Per Occurrence/Aggregate or Per Claim or Loss/Aggregate with a deductible not to exceed \$10,000. Errors & Omissions Insurance shall be applicable to any occurrence arising out of the performance of services pursuant to any statement of work between the parties and shall cover liability arising from

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information technology services including, but not limited to, intellectual property infringement, privacy infringement, computer or electronic information technology services and, if applicable, software development services. Under an occurrence form, coverage required shall be maintained in full force and effect under the policy during the contract period. Under claims made form, continuous coverage is required. Should Extended Discovery Period or "tail" coverage be required in the event coverage is terminated, such coverage must be maintained for a period of not less than three (3) years.

**ADDITIONAL PROVISIONS**

Certificates of Insurance evidencing all required coverage shall be filed with PGW prior to the commencement of work. Renewal certificates and policies, as required, shall be forwarded to Philadelphia Gas Works for as long as professional contractor performs the work as specified in this contract. All certificates and policies shall contain a provision that coverage afforded will not be canceled or materially altered until at least thirty (30) days after prior written notice has been given to PGW.

It shall be the responsibility of the Proposer to ensure that all subcontractors carry insurance of not less than coverage and limits specified herein except to the extent that PGW's Director of Risk Management may agree to lower limits on a case by case basis depending on the nature of the subcontractor's work. Proper evidence of this compliance must be forwarded to Philadelphia Gas Works prior to the inception of any work by subcontractor.

**2.9 Indemnification**

The Proposer will be required in the contract to "protect, defend, indemnify and hold harmless PGW, PFMC, and the City of Philadelphia, and their respective officers, directors, boards, commissions, commissioners, agents, contractors, employees and/or their invitees from and against all claims, demands, loss, fines, penalties, and causes of action, damages or liability(ies) for bodily injury, including death, and for damage to property, including the property of any of them, incurred by reason of any willful or negligent act of commission or omission of successful Proposer, its agents or employees, arising out of or taking place in the course of the performance of this contract; (ii) or results from or arises out of the violation of any third party's trade secrets, trademarks, copyright, patent rights or other proprietary rights in connection with a breach of any warranty set forth in the contract." The indemnification shall include the fees and expenses of attorneys and experts, etc. The Successful Proposer's indemnification expressly includes any claims for personal injuries or death made by or on behalf of Proposer's employees against PGW, PFMC, the City of Philadelphia and each of their respective employees, officers, directors, commissions, commissioners, agents, contractors, employees and/or invitees.

PGW does not indemnify.

## **2.10 Certificate of Non-Indebtedness**

The Proposer will be required to certify and represent that Proposer and Proposer's parent company(ies) and subsidiary(ies) are not indebted (at the time of signing of the contract) to the City of Philadelphia, PGW or PFMC (collectively the "City"), and will not at any time during the term of the contract (including any extensions or renewals thereof) be indebted to the City, for or on account of any delinquent taxes (including, but not limited to, taxes collected by the City on behalf of the School District of Philadelphia), liens, judgments, fees or other debts for which no written agreement or payment plan satisfactory to the City has been established. In addition to any other rights or remedies available to PGW at law or in equity, Proposer acknowledges that upon any breach or failure to conform to such certification PGW shall have the right to, and may, at the option of PGW, withhold payments otherwise due to Proposer, and, if such breach or failure is not resolved to PGW's satisfaction within a reasonable time frame as specified by PGW in writing, this will offset any such indebtedness against said payments and/or terminate this Agreement for default (in which case Proposer shall be liable for all excess costs and other damages including reasonable attorney's fees resulting from the termination).

## **2.11 Non-Discrimination**

Proposer shall not discriminate or permit discrimination against any person because of race, color, religion, national origin, sex or sexual orientation. In the event of such discrimination, PGW may, in addition to any other rights or remedies available under the contract, at law or in equity, terminate any contract with Proposer forthwith.

Proposer shall comply with the provisions of Title VII of the Civil Rights Act of 1964 (42 U.S.C. §200d et seq.), §504 of the Federal Rehabilitation Act of 1973 (29 U.S.C. §794), The Age Discrimination Act of 1975, (42 U.S.C. §6101 et seq.), Title IX of the Education Amendments of 1972, (20 U.S.C. §1681), and 45 C.F.R. Part 92, as they may be amended from time to time, which together prohibit discrimination on the basis of race, color, national origin, sex, handicap, age and religion.

Proposer understands and agrees that no individual with a disability shall, on the basis of the disability, be excluded from participation in any contract of Proposer with PGW or from activities or services provided under such contract. As a condition of accepting and executing such contract, Proposer shall comply with all provisions of the Americans with Disabilities Act, 42 U.S.C. §12101 et seq., and all regulations promulgated thereunder, as the Act and regulations may be amended from time to time, which are applicable (a) to Proposer, (b) to the benefits, services, activities, facilities and programs provided in connection with this Agreement, (c) to PGW, or the Commonwealth of Pennsylvania, and (d) to the benefits, services, activities, facilities and programs of PGW or of the Commonwealth.

Without limiting the generality of the preceding sentence, Proposer shall comply with the "General Prohibitions Against Discrimination," 28 C.F.R. §35.130, and all other regulations promulgated under Title II of "The Americans with Disabilities Act," as they may be amended from time to time, which are applicable to the benefits, services, programs and activities provided by PGW through contracts with outsider contractors.

## **2.12 MacBride Principles**

Proposer certifies and represents that, to the best of its knowledge, (i) Proposer (including any affiliates under its direct control) does not have, and will not have at any time during the term of any contract with PGW (including any extension or renewal thereof), any investments, licenses, franchises, management agreements or operations in Northern Ireland and (ii) no product to be provided under any contract with PGW will originate in Northern Ireland, unless Proposer has implemented the fair employment principles embodied in the MacBride Principles.

In the performance of any contract with PGW, Proposer covenants that it will not utilize any suppliers, subcontractors at any tier (i) who have (or whose parent, subsidiary, exclusive distributor or affiliates have) any investments, licenses, franchises, management agreements or operations in Northern Ireland or (ii) who will provide products originating in Northern Ireland unless said supplier or subcontractor has implemented the fair employment principles embodied in the MacBride Principles. Proposer further covenants to include the provisions of this paragraph, with appropriate adjustments for the identity of the parties, in all subcontracts and supply agreements which are entered into in connection with the performance of any contract with PGW. Proposer covenants that it will cooperate with PGW and City's Director of Finance in any manner which PGW and the said Director deem reasonable and necessary to carry out PGW's and the Director's responsibilities under Section 17-104 of the Philadelphia Code which embodies the requirements set forth in this section. Proposer understands and agrees that any false certification or representation in connection with this section and any failure to comply with the provisions of this section shall constitute a material breach of any contract with PGW entitling PGW to all rights and remedies provided therein or otherwise available in law (including, but not limited to, Section 17-104 of the Philadelphia Code) or equity. In addition, Proposer understands that false certification or representation in connection with this section is subject to prosecution under Title 18 Pa.C.S.A. Section 4904.

## **2.13 Governing Laws**

Any contract entered into by PGW will be executed in and shall be governed by the laws of the Commonwealth of Pennsylvania.

## **2.14 Certain Required Disclosures**

In accordance with the City of Philadelphia's contract reform legislation, codified as The Philadelphia Code Title 17 Chapter 17-400, persons and entities who wish to provide goods and services to PGW must provide certain information about contributions they have made to elected City officials or candidates for City offices. All Proposers must therefore complete Attachment D and include such completed Attachment with their proposal. Please note that the selected Proposer will be required to update such disclosure during the term of its agreement with PGW and for one year thereafter.

### **3 Instructions to Proposers**

#### **3.1 Proposal Preparation Requirements**

3.1.1 Proposals must be prepared in English on 8 ½ x 11 inch paper with tabbed indexes separating the following six (6) completed sections in the following order:

3.1.1.1 **Tab 1:** Transmittal letter.

3.1.1.2 **Tab 2:** (1) Proposed work plan, (2) procedure (3) work schedule/timeline to provide the scope of work described in Section 2 of this RFP and (4) completed Attachment P.

3.1.1.3 **Tab 3:** Proposal Pricing.

3.1.1.4 **Tab 4:** Completed Section 4 (Proposer Information) of this RFP. All Proposals must include the following information and be signed (at the end of Section 4) as follows:

- If the Proposal is made by an individual, the Proposal must be signed by the individual, the individual's full name must be typed or printed under the signature line and the Proposal must include the individual's mailing address.
- If the Proposal is made by a partnership, the Proposal must:
  - a) be signed by at least one of the general partners with authority to bind the partnership and the name of the general partner must be typed or printed under the signature line;
  - b) include the name and mailing address of the partnership; and
  - c) attach a copy of the partnership agreement, or other document authorizing the general partner to sign the Proposal to bind the partnership.
- If a corporation makes the Proposal, the Proposal must:
  - a) be signed by the president or vice president of the corporation, and the secretary or treasurer must attest the signature and the names of the corporate officers must be typed or printed under the signature lines;
  - b) include the name and mailing address of the corporation; and

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- c) attach a copy of the corporation's by-laws or a corporate resolution authorizing the corporate officer signing the Proposal to bind the corporation.
- If the Proposal is made by a joint venture, the Proposal must:
  - a) be signed by all joint venture partners and the names of the joint venture partners must be typed or printed under the signature lines;
  - b) include the name and mailing address of the joint venture; and
  - c) attach a copy of the joint venture agreement or other documentation signed by each member of the Joint Venture and, if applicable, any documentation necessary to show that the individuals signing on behalf of each joint venture partner are authorized to bind the joint venture.

3.1.1.5 **Tab 5:** Qualification and Experience of Proposer. Proposers are strongly encouraged to list experience providing similar vehicle and equipment auction services for companies in the utility industry.

- Provide the names and contact information of references within the utility industry along with appropriate metrics on fleet size and implementation of proposed solution.
- Indicate whether individuals that will take part in implementation are full time employees of Proposer's organization (and if so for how long) or a subcontractor. If the individual is a subcontractor, list the engagements (and the particular responsibilities on each engagement) that the subcontractor has previously worked for Proposer.
- Indicate the areas of the Project that each individual will be involved with or have responsibility for.

3.1.1.6 **Tab 6:** Completed Attachments B, C and D, and any other attachments required to be completed under the RFP.

3.1.2 One (1) original Proposal, One (1) copy and One (1) CD containing a searchable PDF readable by Adobe Reader 7.0 or higher of the proposal, must be submitted in a sealed envelope or envelopes addressed to PGW Procurement Department, Philadelphia Gas Works, 800 W. Montgomery Avenue, Philadelphia, Pennsylvania 19122. The following information must also appear on the face of the envelope: (i) the name and address of the Proposer and (ii) the PGW RFP ID number. The PDF file name should be as follows: PROPOSER\_RFP\_#####.PDF where Proposer is your company name and ##### is the PGW RFP ID number.

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- 3.1.3 Failure to answer all questions completely and furnish all information required in these Proposal Documents may result in disqualification of the Proposer. PGW reserves the right to thoroughly investigate the financial status and experience of the Proposer.
- 3.1.4 It shall be the responsibility of the Proposer to deliver the Proposal and all other required items to the location specified in Section 1 of these Proposal Documents on or before the due date and time set forth in Section 1.1.
- 3.1.5 Oral communications from PGW personnel or other persons shall not be binding on PGW and shall in no way modify the provisions of the Proposal Documents. Official responses of PGW to inquiries regarding these Proposal Documents shall be issued by PGW in writing as addenda, and only such written responses shall be binding on PGW as modifications to these Proposal Documents.

### **3.2 Duration of Proposal**

In consideration of PGW's evaluation of the submitted Proposals, each Proposer agrees that its Proposal shall be a firm offer to PGW, and shall remain open for acceptance by PGW for a period of at least one hundred and fifty (150) days beginning with the submission due date set forth in Section 1 of these Proposal Documents, as may be revised by addenda.

### **3.3 Proposer's Responsibility**

The Proposer shall carefully examine the terms of the Proposal Documents and shall judge for itself all of the circumstances and conditions affecting its Proposal. PGW will endeavor to present accurate information, but Proposers are advised to independently verify the accuracy of any information received.

## **4 Proposer Information**

### **4.1 Proposer**

#### **Submitted by:**

[Please type or print]

Name: \_\_\_\_\_  
\_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Telephone: \_\_\_\_\_

Facsimile: \_\_\_\_\_

The undersigned Proposer hereby submits to PGW this Proposal as described herein and in the attached documents.

### **4.2 Qualifications Statement**

The Proposer represents and covenants that the Proposer is fully qualified to provide the requested services to PGW. The undersigned further swears and affirms that the information contained in this response is true, accurate and complete.

### **4.3 Business Experience**

4.3.1 The following describes other points of service by Proposer and the companies for whom the services were provided. Proposer should include a reference contact at the described companies, and this contact should have direct, specific responsibility for the oversight of the program. In particular, the Proposer should describe all experience with projects similar to this project.



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- 4.3.3 Proposer must attach the resume of the manager which it anticipates will be the contact for the services required by this RFP.
- 4.3.4 The Proposer submits herewith the following list of three (3) persons or businesses, which have knowledge of the Proposer's ability to successfully perform the services for which this Proposal is submitted.

**REFERENCE NO. 1**

**Name:** \_\_\_\_\_

**Firm:** \_\_\_\_\_

**Title:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Telephone:** \_\_\_\_\_

**Facsimile:** \_\_\_\_\_

**Nature of Association:** \_\_\_\_\_

**REFERENCE NO. 2**

**Name:** \_\_\_\_\_

**Firm:** \_\_\_\_\_

**Title:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Telephone:** \_\_\_\_\_

**Facsimile:** \_\_\_\_\_

**Nature of Association:** \_\_\_\_\_

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**REFERENCE NO. 3**

**Name:** \_\_\_\_\_

**Firm:** \_\_\_\_\_

**Title:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Telephone:** \_\_\_\_\_

**Facsimile:** \_\_\_\_\_

**Nature of Association:** \_\_\_\_\_

4.3.5 The Proposer has not had an agreement canceled or terminated due, in whole or in part, to the fault of Proposer, or a default or breach of contract on the part of the Proposer. (If a contract or agreement has been canceled, please explain.)

**4.4 Financial Information**

4.4.1 If the Proposer requests that PGW receive and maintain any of the following financial information in confidence, the Proposer understands that such information may not be exempt from disclosure under the Philadelphia Home Rule Charter and/or the Commonwealth Right to Know Act. The Proposer agrees that PGW may make such disclosure or reproduce such financial information as is deemed necessary or convenient by PGW, its officers, agents, or employees, for PGW's use in Proposal evaluation and comparison; provided, however, that if any person makes a request as contemplated by the Philadelphia Home Rule Charter and/or Commonwealth Right to Know Act to review or be provided with copies of such financial information or any part thereof, and PGW denies such requests, immediately upon notification thereof, the Proposer shall, at its sole cost and expense, defend PGW and its officers, agents, and employees against any action resulting from denial of such request. If the Proposer fails to promptly provide such defense, PGW, its officers, agents, and employees shall be free to grant such requests, and the Proposer shall be deemed to have waived any cause of action, whether in law or in equity, that it may have against PGW respecting such disclosure. The Proposer agrees to indemnify and hold harmless PGW, its officers, agents, and employees from any and all claims, costs, liabilities or damages, including attorney's fees and court costs resulting from PGW's or Proposer's acts or omissions pursuant to this Paragraph.

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4.4.2 The Proposer has ( ) has never ( ) [check one] had a bond or surety canceled or forfeited. (If the Proposer has had a bond or surety canceled, state the name of the bonding company, date, amount of bond and reason for such cancellation or forfeiture.)

4.4.3 The Proposer has ( ) has never ( ) [check one] been adjudged bankrupt (Chapter 7), or petitioned the court for relief under the Bankruptcy Code or Act for either business reorganization (Chapter 11) or the Wage Earner's Plan (Chapter 13). If the response is in the affirmative, provide the following information:

4.4.3.1 Date petition filed

4.4.3.2 Case No. and jurisdiction

4.4.3.3 Amount of liabilities and debts

4.4.3.4 Date of discharge or successful completion of reorganization or wage earner's plan

4.4.4 The Proposer's bank references are:

Name	Address
4.4.4.1. _____	_____
4.4.4.2. _____	_____
4.4.4.3. _____	_____

The undersigned herewith submits a letter from

\_\_\_\_\_ indicating that the Proposer has an  
(name of financial institution)

available working line of credit of no less than \_\_\_\_\_ Dollars (\$\_\_\_\_\_), or other evidence of Proposer's capital sufficient to permit it to meet the obligations contemplated by its Proposal.

4.4.5 The undersigned hereby affirms that the Proposer is authorized to conduct business in the Commonwealth of Pennsylvania, and City of Philadelphia, or will obtain proper authorization to do so before executing an agreement and furnishing the required bond or letter of credit, if any.

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**4.5 General Litigation Disclosure**

Proposer must describe any pending, contemplated or ongoing administrative or judicial proceedings material to Proposer's business, finances or products including, but not limited to, any litigation, consent orders, debarment or contracts with any local, state or federal regulatory agency issued to Proposer or to any parent or subsidiary of Proposer: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

**4.6 Business Organization Statement**

4.6.1 General Information

Name of Firm [Exactly as it would appear on an agreement; if operating under a fictitious name, so indicate.]

\_\_\_\_\_

Principal Office Address:

\_\_\_\_\_

\_\_\_\_\_

Telephone Number:

\_\_\_\_\_

Form of Business Entity [check one]

- ( ) Corporation
- ( ) Partnership
- ( ) Individual
- ( ) Joint Venture

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4.6.2 Corporation Statement

If a corporation, answer the following:

Date of incorporation: \_\_\_\_\_

Location of incorporation: \_\_\_\_\_

Is the corporation authorized to do business in Pennsylvania? Yes ( ) No ( )

If so, as of what date? \_\_\_\_\_

The corporation is held: Publicly ( ) Privately ( )

Furnish the name, title, and address of each director and officer of the corporation.

**DIRECTORS**

	<b>Name</b>	<b>Address</b>	<b>Principal Business Affiliation Other than Proposer's Directorship</b>
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____
5.	_____	_____	_____
6.	_____	_____	_____
7.	_____	_____	_____
8.	_____	_____	_____

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**SHAREHOLDERS**

	Name	Address	Number of Shares Owned
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____
5.	_____	_____	_____
6.	_____	_____	_____
7.	_____	_____	_____
8.	_____	_____	_____

**OFFICERS**

	Name	Position
1.	_____	_____
2.	_____	_____
3.	_____	_____
4.	_____	_____

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4.6.3 Partnership Statement

If a partnership, answer the following:

Date of organization: \_\_\_\_\_  
General Partnership ( )    Limited Partnership ( )

Partnership Agreement recorded?    Yes ( )    No ( )

\_\_\_\_\_    \_\_\_\_\_    \_\_\_\_\_    \_\_\_\_\_    \_\_\_\_\_  
Date                      Book                      Page                      County                      State

Has the partnership done business in Pennsylvania?    Yes ( )    No ( )

When? \_\_\_\_\_

Name, address, and ownership share of each general partner owning more than five percent (5%) of the partnership:

	Name	Address	% of Ownership
1.	_____	_____	_____ %
2.	_____	_____	_____ %
3.	_____	_____	_____ %
4.	_____	_____	_____ %
5.	_____	_____	_____ %
6.	_____	_____	_____ %

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4.6.4 Joint Venture Statement

If a Joint Venture, answer the following:

Date of organization: \_\_\_\_\_

Joint Venture Agreement recorded? Yes ( ) No ( )

\_\_\_\_\_

Date	Book	Page	County	State
------	------	------	--------	-------

Has the Joint Venture done business in Pennsylvania? Yes ( ) No ( )

When? \_\_\_\_\_

Name, address of each Joint Venture and percent of ownership of each:

	Name	Address	% of Ownership
1.	_____	_____	%
2.	_____	_____	%
3.	_____	_____	%
4.	_____	_____	%
5.	_____	_____	%

**4.7 Warranties by Proposer**

4.7.1 The Proposer's Proposal has been completed to the best of the Proposer's ability, and the Proposer swears that all information contained herein is true, correct and complete to the best of the Proposer's knowledge, information and belief.

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4.7.2 By submission of this Proposal, the Proposer acknowledges that PGW has the right to make any inquiry or investigation it deems appropriate to substantiate or supplement information contained in the Proposal, and Proposer authorizes the release to PGW of any and all information sought in such inquiry or investigation.

4.7.3 The Proposer declares by the submission of this Proposal that the Proposal is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation; that the Proposal is genuine and not collusive or sham; that the Proposer has not directly or indirectly induced or solicited any other Proposer to put in a false or sham Proposal, and has not directly or indirectly colluded or agreed with any Proposer or anyone else to put in a sham Proposal or to refrain from proposing; that the Proposer has not directly or indirectly sought by agreement or communication to secure any advantage against PGW; anyone interested in the Proposal as principal are named within the Proposal; that all statements contained in the Proposal are true; that the Proposer has not directly or indirectly divulged information or data relative to the Proposer's Proposal to any other person, partnership, corporation, or association, except to such person or persons as have a direct financial interest in the Proposer's general business.

The foregoing Proposal is hereby submitted by the entity signing below in accordance with all terms and conditions as set forth in the Request for Proposals issued by PGW.

PROPOSER:

DATE: \_\_\_\_\_  
(Corporate Seal if Applicable)

\_\_\_\_\_  
Name of Proposer

By: \_\_\_\_\_  
(signature)

Name:  
Title:

Attest: \_\_\_\_\_  
(signature)

Name:  
Title:

[Add signature lines as necessary below.]

## **5 Proposal Evaluation, Negotiation and Contract Award**

### **5.1 Disqualification of Proposers**

- 5.1.1 If more than one Proposal is received from any individual, firm, partnership, corporation, or association, under the same or different names, said Proposals will not be considered. Reasonable grounds for believing that any Proposer has an interest in more than one Proposal will cause the rejection of all Proposals in which such Proposer is interested. If there is reason to believe that collusion exists among Proposers, none of the participants in such collusion will be considered. Similarly, unsolicited proposals may not be considered.
- 5.1.2 No Proposal shall be received from, or contract awarded to, any PGW or City employee or official who may have any direct or indirect interest in such submitted Proposal or contract.

### **5.2 Qualification of Proposers**

- 5.2.1 PGW will carefully consider the Proposer's qualifications, proposed financial consideration, experience, financial responsibility proposed scope of services, and timeline in evaluating each Proposal. In PGW's evaluation, the Proposal as a whole may bear more weight than the individual parts of the Proposal.
- 5.2.2 Following PGW's review of the submitted proposals, PGW may select one or more Proposers with which to negotiate. PGW shall notify Proposer(s) of selection for negotiations. The date that the Proposer's receipt of the notification is confirmed by PGW, is referred to herein as the "Notification Date."
- 5.2.3 Respondents to this RFP are subject to Philadelphia Code (Chapter 20-600) and the Pennsylvania Ethics Act (65 P.S. Section 401 et.seq.) All respondents are required to disclose any potential conflict caused by PGW or City employees having a financial interest in the entity entering into a contract or agreement with PGW.

### **5.3 General Reservation of Rights**

- 5.3.1 This RFP and the process it describes are proprietary to PGW and are for the sole and exclusive benefit of PGW. No other party, including any respondent to this RFP or future Proposer to any RFP which may be issued by PGW, is intended to be granted any rights hereunder. Any response to this RFP, including written documents and verbal communication, may be subject to public disclosure by PGW, or any authorized agent of PGW and any materials submitted or ideas elicited in response to this RFP shall be the sole and absolute property of PGW with PGW having title thereto and unrestricted use thereof.

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- 5.3.2 PGW reserves the right to reject as informal or non-responsive any Proposal that, in PGW's sole judgment, is incomplete, is not in conformity with applicable law, is not responsive to this RFP, or contains ambiguities or services not called for by this RFP.
- 5.3.3 Without limiting the generality of any other provision of this RFP, PGW reserves the right, at any time prior to execution of an agreement with the successful Proposer, to exercise all or any of the following rights and options, which rights and options PGW may exercise to the extent that PGW, in its sole discretion, deems to be in its best interests:
- 5.3.3.1 To request additional or supplemental information (including but not limited to information inadvertently omitted by any Proposer in response to this RFP) from any or all Proposers;
- 5.3.3.2 To accept or reject, at any time prior to its execution of an agreement, any or all Proposals or any part thereof submitted in connection with this RFP;
- 5.3.3.3 To accept or reject any or all of the items in any Proposal and award the contract in whole or in part if it is deemed in PGW's best interest to do so;
- 5.3.3.4 To waive any informality, defect, non-responsiveness, or derivation from this RFP that is not, in PGW's sole judgment, material to the Proposal;
- 5.3.3.5 To negotiate unacceptable provisions incorporated within an otherwise acceptable Proposal submitted in response to this RFP;
- 5.3.3.6 To reject without evaluation any Proposal that is incomplete, unclear, conditional, or which contains irregularities of any kind;
- 5.3.3.7 To reject any Proposal that in the sole discretion of PGW is not in the best interest of PGW;
- 5.3.3.8 To re-issue this RFP without change or modification;
- 5.3.3.9 To issue a subsequent RFP for this project with terms and conditions that are substantially different from the terms and conditions set forth in this RFP;
- 5.3.3.10 To cancel this RFP with or without issuing another RFP;
- 5.3.3.11 To supplement, amend, substitute, or otherwise modify this RFP at any time prior to execution of a final agreement with a Proposer;

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- 5.3.3.12 To reject the Proposal of a Proposer that, in PGW's sole judgment, has been delinquent or unfaithful in the performance of any contract with PGW, or is financially or technically incapable of performing the services required in this RFP, or is otherwise not a responsible Proposer;
- 5.3.3.13 To permit or reject, at PGW's sole discretion, amendments (including information inadvertently omitted), modifications, alterations and/or corrections of Proposals by some or all of the Proposers following Proposal submission;
- 5.3.3.14 To request that some or all of the Proposers modify Proposals or provide additional information following evaluation by PGW;
- 5.3.3.15 To conduct such investigations as PGW considers appropriate with respect to the qualifications of any Proposer and/or any information contained in any Proposal;
- 5.3.3.16 To request clarifications of any unclear Proposal;
- 5.3.3.17 To negotiate simultaneously, or otherwise, with one or more Proposers;
- 5.3.3.18 To discontinue and resume negotiations with one or more Proposers;
- 5.3.3.19 To rescind its rejection of any Proposal(s) and negotiate (or resume negotiations) with a previously rejected Proposer;
- 5.3.3.20 To not proceed with the process described in this RFP, or to change any time schedules set forth herein;
- 5.3.3.21 To not enter into an agreement pursuant to this RFP.
- 5.3.4 PGW intends to enter into contract negotiations with the selected Proposer. However, PGW reserves the right to terminate any negotiations at any time or conduct simultaneous, competitive negotiations with multiple Proposers. PGW reserves the right to negotiate acceptable terms in an otherwise unacceptable Proposal. Such negotiations may result in changes to material terms of this RFP; in such event, PGW shall not be obligated to inform other Proposers of the changes, or permit them to revise their Proposals accordingly, unless PGW, in its sole discretion, determines that doing so and permitting such is in PGW's best interest. Should negotiations not prove satisfactory with the recommended Proposer(s), PGW reserves the right to discontinue negotiations with the recommended Proposer(s) and additional firms may be asked to enter into negotiations or PGW may solicit new Proposals or issue a new Request for Proposals.

## **5.4 Award**

- 5.4.1 PGW intends to award the agreement to the Proposer whose Proposal best satisfies the scope of services described in Section 2 and is otherwise in the best interest of PGW. The determination of award shall be made by PGW, in its sole discretion, which decision shall be final. PGW may employ such analysis techniques and professional consultants for Proposal evaluation as it deems necessary. PGW may request submission of additional information to assist it in evaluating a Proposal, and the Proposer shall cooperate fully with such request. The contract resulting from this RFP will be awarded to the qualified Proposer whose Proposal PGW believes will be the most advantageous to PGW. PGW may condition an award on the successful Proposer's agreement to such terms and conditions as required by PGW including, but not limited to, PGW's indemnification.

### ATTACHMENT C. DEMOGRAPHIC SURVEY

A key tenet of PGW's practice of good corporate citizenship is its commitment to the use, non-discrimination against and development of qualified minority, disabled and women vendors and to non-discrimination in employment.

In an effort to insure the full inclusion of all segments of the American population, PGW is requesting that the following information be returned with your proposal:

- A. Does your organization have a written program which addresses the utilization of minority business enterprises (MBE), disabled business enterprises (DBE) and women enterprises (WBE) in the manufacturing, distribution of servicing of your product(s)? If so, please furnish a copy of your program. Please provide statistics of MBE, DBE and WBE in (1) manufacturing, (2) distribution, and (3) service for the past two years. YES NO

COMMENTS: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- B. Does your organization foster economic growth and development by providing procurement opportunities to MBE/DBE/WBE firms as material suppliers, contractors, sub-contractors, etc? If so, please furnish a copy of your company policy or directive. YES NO

COMMENTS: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- C. Does your organization have an Affirmative Action Equal Employment Opportunity Policy? If so, please furnish a copy of this policy. YES NO

COMMENTS: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



**ATTACHMENT D. REQUIRED 17-1400 DISCLOSURE**

In accordance with the City of Philadelphia’s contract reform legislation, codified as The Philadelphia Code Title 17 Chapter 17-1400, persons and entities who wish to provide goods and services to PGW must provide certain information about contributions they have made to elected City officials or candidates for City offices. Please note that, if selected, you will be required to update such disclosure during the term of your agreement with PGW and for one year thereafter.

Therefore, the following information must be provided to PGW:

1. Did you use any consultant with respect to this RFP or the contract at issue within the prior one year period? If so, you are required to list (in an attachment hereto) the following information for each such consultant: (i) name, (ii) business address, (iii) business phone number and (iv) amount paid or to be paid. YES NO

As used herein, the term “consultant” means any person or entity used to assist you in obtaining a contract through direct or indirect communication with the City, PGW, any City Agency or any officer or employee of any of them, if such communication is undertaken by the person or entity for payment.

2. Have you or any consultant disclosed above made any contributions of money or in-kind assistance within the prior two year period to (i) any candidate for nomination or election to any public office in Pennsylvania, (ii) any individual who holds any such office, (iii) any political committee or state party in Pennsylvania or (iv) any group, committee or association organized in support of any such candidate, office holder, political committee or state party in Pennsylvania? If so, you are required to list (in an attachment hereto) the date, amount and recipient of each such contribution. YES NO

For purposes hereof, (i) contributions made by a person’s immediate family shall be deemed contributions made by that person and (ii) contributions made by an entity’s affiliate or an officer, director, controlling shareholder or partner of an entity’s or such entity’s affiliate shall be deemed contributions made by that entity.

3. Do you intend to use any subcontractors on this contract? If so, you are required to list (in an attachment hereto) the following information for each such subcontractor: (i) name, (ii) business address, (iii) business phone number and (iv) amount or percentage to be paid. YES NO

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4. Within the prior two year period, has any City or PGW officer or employee asked (i) you, (ii) any of your officers, directors or management employees or (iii) any person or entity representing you, to give money, services, or any other thing of value to any person or entity? If so, you are required to list (in an attachment hereto) the following information for each such officer or employee: (i) name, (ii) title, (iii) date of request, (iv) amount requested and (iv) amount of any payment made in response to request (other than contributions listed under (2) above). YES NO
5. Within the prior two year period, has any City or PGW officer or employee directly or indirectly advised (i) you, (ii) any of your officers, directors or management employees or (iii) any person or entity representing you, that a particular person or entity could be used by you to satisfy any goals in this RFP or contract for the participation of minority, women, disabled or disadvantaged business enterprises? If so, you are required to list (in an attachment hereto) the following information for each such officer or employee: (i) name, (ii) title, (iii) date of advice and (iv) name of person or entity they advised could be used to satisfy such goals. YES NO

The undersigned hereby certifies that the information provided herein is true and correct as of the date set forth below.

Signature: \_\_\_\_\_

Title: \_\_\_\_\_

Name of Entity: \_\_\_\_\_

Date: \_\_\_\_\_

(Please Print)

**ATTACHMENT P: DETAILED VENDOR AND SYSTEM REQUIREMENTS**

General Requirements (G)

Section	Specification	Requirement (M)andatory or (D)esirable	Vendor Capability (Y)es, (C)ustomization Required, (N)ot Available	Proposal Reference
G1	The system shall be capable of being tailored to meet the specific needs of PGW’s fleet operations department through user defined parameters and codes. Additionally, the system must be completely user definable and the User Interface must be user definable, including all reports, columns and fields.	M		
G2	All labor codes (both direct and indirect) must be user definable within the system.	M		
G3	The system shall be capable of capturing all labor transactions in “real time” (as they occur).	M		
G4	The system shall allow for multiple labor rates, by location, for regular time and overtime, and provide User option for shop rate or employee rate.	M		
G5	The system shall be capable of utilizing complete ATA VMRS coding structure.	M		
G6	The system shall have the ability to export a file consisting of any data fields contained in the system to other systems in ASCII or a standard database format. <b>Specify the available formats.</b>	M		

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G7	The system shall have the ability to record work performed and parts used by keyboard or bar code entry.	M		
G8	All modules of the system shall be integrated to the highest degree possible. The operator does not have to log out of one module and into another to move from function to function.	M		
G9	The system shall be able to calculate straight-line depreciation.	M		
G10	The system shall be capable of logging labor transactions directly to a work order through a labor transaction screen or through use of a bar code device.	M		
G11	The system shall be capable of identifying warranties for both replacement parts and original equipment components and of tracking the status of claims and reimbursements.	M		
G12	The system must not be web-enabled but web based and have been in production for over 5 years at over ten (10) customer sites.	M		
G13	The system shall be capable of tracking both direct and indirect labor.	M		
G14	The system shall contain a user-friendly ad hoc report writer without using any external reporting tools. It shall have the capability of downloading data in ASCII and standard ODBC database formats, including but not limited to Microsoft Access & Excel.	M		

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G15	The system shall allow data entry editing and validation of data entered by keyboard or other data entry devices. Edits shall include value ranges, formats, required fields, and correct codes.	M		
G16	The system shall display error messages and prompts where appropriate.	M		
G17	The vendor shall provide expected transaction and screen "paint" response times for the proposed system and suggested hardware, software, and connectivity requirements.	M		
G18	Provide for global changes to specific data tables/fields to include department number, work order number, employee number, work order repair type/task and equipment class codes.	M		
G19	The system shall support a user defined fiscal calendar.	M		
G20	The system shall support hand held data entry devices capable of recording labor and parts. PGW may use hand held devices for warehouse operations in the future. Data recorded in the hand held device shall be capable of being loaded and processed into the software's database without manual re-keying. Uploading shall not interfere with, and shall be capable of being performed concurrently with, all other routine system functions.	M		
G21	The system shall support mathematical calculations on any field.	M		

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G22	System shall be written in a fourth generation programming language. <b>List languages and versions</b> used to develop and maintain the system.	M		
G23	The system shall operate in client/server configuration, and the client software shall run on either Windows 2000 or higher.	M		
G24	The system shall provide graphical user interface (GUI) conforming to industry standards such as Microsoft Application Guidelines.	M		
G25	The system shall provide on-line/on-screen help.	M		
G26	The system shall utilize an industry standard relational database such as Oracle or SQL Server. <b>State database(s) supported by the system.</b>	M		
G27	The system shall be transaction based. Details of each transaction shall provide a clear audit trail for verification and be readily available via a system-generated ad hoc report.	M		
G28	The vendor shall supply data entry templates to support manual entry of data during data migration, where applicable.	M		
G29	The system shall have import and export facilities controlled by a built-in security mechanism.	M		
G30	Security system to: 1) prohibit access to data by unauthorized operators; 2) restrict viewing of data for separate location(s)/facility (ies) without appropriate	M		

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	access; 3) establish operator identity for each transaction; and 4) maintain detailed system audit trails by user ID. System audit trail data shall be retrievable using the system’s ad-hoc report generator, and data retrieval shall be access-protected by the security system. System audit trail data shall <u>not</u> be editable by other functions or software tools included with the system.			
G31	The system shall support e-mail messaging.	M		
G32	The system shall have a user definable dashboard with industry standard KPIs	M		
G33	The system shall have documents (photos, text files) attachment capabilities.	M		
G34	The system shall have an alert management feature to highlight abnormal occurrences, defects, or discrepant conditions based on pre-defined parameters.	M		

**Fleet Management (FM)**

Section	Specification	Requirement (M)andatory or (D)esirable	Vendor Capability (Y)es, (C)ustomization Required, (N)ot Available	Proposal Reference
FM1	The system shall include a mechanism to identify vehicles tagged in a manufacturer's recall campaign by vehicle ID number or vehicle number. It must also be able to identify if a recall vehicle is	M		

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	currently in shop or due for PM and post that information on work order.			
FM2	The system shall be able to track an unlimited number of warranties on an individual vehicle basis (to include system, component, and accessory warranties in addition to the vehicle warranty). The system should supply a user with the option to print warranty notification to screen, on the printed work order, or both. The system shall have warranty reporting functions to meet industry acceptable standards for Ford, GM, Chrysler, etc.	M		
FM3	The system shall be capable of recording out-of-service time, showing user-defined reason for equipment unavailability and capable of establishing default downtime codes by repair location. It shall be capable of accumulating reasons for unavailability and reporting by vehicle, class, and repair location.	M		
FM4	The system shall be capable of tracking accident repairs and accident reports and associating accidents with specific vehicles, operators, vehicle classes, customer departments, and repair locations.	M		
FM5	The system shall be capable of recording a minimum of two meters of user-definable types for each vehicle. The system shall perform scheduling and utilization evaluation based on any or all meter types. It	M		

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	shall be capable of updating and reconciling selected meters quickly and easily from fuel interface or by manual entry.			
FM6	<p>The system shall contain a replacement module capable of forecasting units due for replacement using the following criteria:</p> <ol style="list-style-type: none"> <li>1. Usage (all meters)</li> <li>2. Life in months or years</li> <li>3. Maintenance cost parameter</li> <li>4. Combined evaluation as established by the user.</li> </ol> <p>Replacement projections shall include cost of replacement, by year, and in order of priority according to user-established criteria.</p>	M		
FM7	The system shall support user defined and Vehicle Maintenance Reporting Standards repair codes.	M		
FM8	The system shall be able to control work order spending limits on a per-unit and/or per-work order basis. This shall include estimated work order cost prior to work being performed by technician. Spending limit control shall include a security-controlled limit override authorization function.	M		
FM9	The system shall be able to define standards and provide periodic exception reports for all information that falls outside user-defined parameters for	M		

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	operating cost, repair times, utilization by equipment class, repair cost by class, and fuel consumption.			
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**Asset Management (AM)**

Section	Specification	Requirement (M)andatory or (D)esirable	Vendor Capability (Y)es, (C)ustomization Required, (N)ot Available	Proposal Reference
AM1	The system shall create and maintain an electronic file/record for each asset and its component parts. The system should also allow for the “copying” of another master record to allow for ease of entry for multiple vehicles that are similar, or that belong to the same class of vehicles. The data fields that are different should automatically prompt the user for the new information, such as serial number, user vehicle number, accounting codes, and other data fields that may change from one vehicle to another.	M		
AM2	The system shall capture, store and report on: all vehicles using their VIN, and on all equipment by unique identifiers.	M		
AM3	The application shall allow grouping/classification of assets based on physical and functional characteristics, operational use, and user preferences.	M		
AM4	The system shall accept input of scanned original documents or QR codes to	M		

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	associate with each asset.			
AM5	The application shall have unlimited interface capabilities with third party applications: Oracle or equivalent; FuelForce or equivalent; etc.	M		
AM6	The system shall provide the ability to retrieve and/or reopen a previously closed asset record.	M		
AM7	The system shall have the capability to produce management and statistical reports specific to asset classes using user-defined sort criteria.	M		
AM8	The system shall maintain an audit trail of the types of reports that have been generated for ease of duplication.	M		
AM9	The system shall allow for easy flagging/designation of assets based on their status, e.g., “Active,” “Inactive,” “To be sold,” “Sold,” “Disposed of,” etc.	M		
AM10	The system shall have the ability to run ad-hoc queries to locate, active, and inactive asset records by name; class; location; individualized identifier (VIN, model #, date of purchase; name of assignee.	M		
AM11	The system shall give the user the ability to create parameter driven statistical reports.	M		
AM12	The system shall advise technicians and supervisors about warranties in effect for work being performed on a vehicle and/or component and automatically generate recovery letters, and	M		

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	calculate all costs incurred, including replacement and/or repair of the parts, and the labor involved.			
AM13	The system shall calculate Book Value of all active assets.	M		
AM14	The system shall track the status of units on order and not yet in service, showing estimated delivery times, units past estimated delivery, and those that have been recently delivered.	M		
AM15	The system shall have the ability to move a unit to a different class, department, or organization without loss of any existing data including work orders, preventative maintenance schedules, historical cost, and accounting information and without the need to delete and re-enter any data.	M		
AM16	The system shall have the ability to re-number an equipment unit without loss of any existing data including work orders, preventative maintenance schedules, unit history, and accounting information and without the need to delete and re-enter any data.	M		
AM17	The system shall allow for the expansion of the fleet size including user departments, divisions, activities within divisions, and repair locations to include parts inventory locations, fuel storage areas, vendors' codes, and accounting requirements.	M		
AM18	The system shall provide on-line search capability by	M		

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	selected equipment record field.			
AM19	The system shall provide storage, on-line maintenance, and reporting for over 3,000 active equipment units, including historical data of disposed assets.	M		
AM20	The system shall provide user-defined status codes including a "mark for delete" status that inactivates the vehicle but keeps it online and available for reporting at user discretion.	M		
AM21	The system shall store complete vehicle history for as long as the vehicle is part of the fleet, or longer, at the user's discretion.	M		
AM22	The system shall have the ability to make global changes to equipment records.	M		
AM23	The system shall allow for the complete tracking of sub-units or mounted equipment with all associated work order transactions, PM scheduling, warranty reporting, and factory recall processing. These master records should be attached and easily maintained.	M		
AM24	The system shall provide for the association of an unlimited number of sub-units (trailers, bodies, etc.) to a main or base unit. The system shall provide users with the option of viewing all inspection and maintenance notifications for sub-units. Maintenance history for sub-units will	M		

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	remain with sub-units when they are reassigned to other units.			
AM25	The system shall have the ability to create an unlimited number of user-defined fields for equipment and technical specifications records.	M		
AM26	The system shall track on-road and off-road usage.	M		
AM27	The system shall capture usage data through a usage data entry screen and through integration with the work order and motor pool modules and data received via interfacing with Philadelphia Gas Work' automated fueling system.	M		
AM28	The system shall track requisition and purchase order numbers and dates pertaining to the acquisition of vehicles and equipment.	M		

**Preventative Maintenance (PM)**

Section	Specification	Requirement (M)andatory or (D)esirable	Vendor Capability (Y)es, (C)ustomization Required , (N)ot Available	Proposal Reference
PM1	The system shall permit automatic PM scheduling by class, individual unit, parking location, operator name, and by department or organization. The system shall schedule all levels of PM inspection even if the current PM being performed has an open work order.	M		
PM2	The system shall schedule PMs utilizing Philadelphia	D		

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	Gas Works' e-mail system. This system may produce a record that can be transmitted via Philadelphia Gas Works' LAN and WAN to individual users or a user within a department as the central point of contact. If the system being proposed has other methods of communicating PM schedules to an individual, please identify in a separate document.			
PM3	The system shall notify user when PM is due, soon due, or overdue or when any other transaction is being performed that requires entry of the vehicle number. The inquiry must provide a "hot key" to open a PM work order at the user's option.	M		
PM4	The system shall support PM frequency for time (number of days, weeks, or months), usage (miles and hours), fuel consumption, or all three. All fuel types must be supported by the system's preventive maintenance program.	M		
PM5	The system shall automatically display and notify on screen PMs due, soon due, and overdue on work orders.	M		
PM6	The system shall provide user defined parameters for automatic generation of PM orders when repair orders are opened for equipment due, soon due, or overdue for PM	M		
PM7	After PM completion (closed work order), the system shall automatically	M		

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	update the next PM due without any manual intervention.			
PM8	The system shall allow for user defined PM Inspection lists (by vehicle and by class) which can be printed on the work order when PMs are opened and on demand.	M		
PM9	The system shall allow manual adjustments for early/late hierarchically scheduled PMs.	M		
PM10	The system shall schedule an unlimited number of discrete PMs per unit/class.	M		
PM11	The system shall provide for hierarchical scheduling of PMs (e.g. if an A, B, C methodology is used, when a C is done it is assumed an A and B have been done and the system automatically reschedules all three). However, the user must have the option to set this assumption in the system.	M		
PM12	The system shall perform PM scheduling from 1 to 90 days in advance. The system will project the amount of labor required, by day, and place this information on the PM scheduling report, listed by unit number within class and showing totals per day and week.	M		
PM13	The system shall allow for 1 to 90 days of advance scheduling to take place when the system is performing PM scheduling. The system will have a lock feature that allows the user to freeze the PM schedule a	D		

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	week or two weeks in advance. Once a schedule is locked, the system will identify the parts needed for that level of PM and place an order in the parts room, listing part number and vehicle number. The system shall keep track of the amount of parts on the shelf, on order from vendors, and on order from the PM scheduler, and make necessary adjustments in the parts reordering process as needed.			
PM14	The system shall be capable of providing “ <b>Predictive Maintenance</b> ” (Please provide details and detailed examples)	D		
PM15	The system shall have the ability to handle cascading PMs (PMs within PMs) to avoid duplication of work.	M		
PM16	The system shall have the ability to mass assign PMs to all vehicles or a select class of vehicles.	M		

Motor Pool (M)

Section	Specification	Requirement (M)andatory or (D)esirable	Vendor Capability (Y)es, (C)ustomizatio n Required , (N)ot Available	Proposal Reference
M1	The system shall accommodate short term and long standing reservations.	D		
M2	The system shall calculate usage data as equipment is returned.	D		
M3	The system shall be capable of capturing and tracking all	D		

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	costs associated with each rental.			
M4	The system shall contain a motor pool module designed to manage multiple pools; must be integrated with the fleet management system.	D		
M5	The motor pool module shall be fully integrated with the preventative maintenance and work order modules.	D		
M6	The system shall generate hard copy trip ticket for each reservation.	D		
M7	The system shall generate on-line list of available units for making reservations.	D		
M8	The system shall provide storage, on-line maintenance, and reporting for a motor pool system.	D		
M9	Supports multiple pool locations and transfers between locations.	D		
M10	The system shall track vehicle condition at check-out and check-in.	D		
M11	The system shall allow outside input from other departments for vehicle reservations	D		

**Reports (R)**

Section	Specification	Requirement (M)andatory or (D)esirable	Vendor Capability (Y)es, (C)ustomization Required , (N)ot Available	Proposal Reference
R1	Ability to access any data field within the database for reporting and file creation.	M		
R2	The system shall be able to	M		

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	produce management and statistical reports specific to asset classes using user-defined criteria.			
R3	Ability to save ad hoc report parameters and formats for reuse.	M		
R4	The system shall be capable of producing color graphics.	D		
R5	Reports can be sent to any system printer or viewed on screen.	M		
R6	The system shall support mathematical operations on ad hoc report rows and columns.	M		
R7	The system shall support multiple subtotal fields.	M		
R8	The system shall include a user-friendly, easy to use internal report writer. No programming expertise required to successfully produce ad hoc reports.	M		
R9	The system shall be capable of scheduling specific reports to be run for user defined dates, times, number of copies and system users.	M		
R10	The system shall provide extensive standard management reports covering vehicles, vehicle classification analysis, (i.e., using department(s), vehicle type(s), vehicle status (es), weight classification(s), fuel type, etc.), equipment, work orders, parts, operations costs, exception reports, and vehicle replacement. Reports must be available with user-defined options that allow tailoring to meet operational needs and also provide for classification tallies (i.e.,	M		

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	unit or department or type and so forth with sub-totals and interrelated grand total). The system must be able to produce both detailed line by line classification description type reports as well as simplistic reports such as descriptive categories only type (reports that supply a single line that represents a group) and must be able to be produced these reports with sub-total(s) and grand total count..			
R11	The system shall include availability calendars with hours of service for day, week, month, weekends, and holidays. Downtime must also be controlled by calendar method.	M		
R12	The system shall be capable of generating repair facility averages for each repair type/task by class for all mechanics or by mechanic.	M		
R13	The system shall use department, motor pool, and repair facility calendars for determining vehicle availability.	D		
R14	The system shall provide depreciation report by equipment unit as part of each equipment record and as a system generated standard report.	D		
R15	The system shall include exception reports for units exceeding established cost standards or for units failing to meet established minimum utilization standards. Exception reporting for all repair reasons must also be	M		

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	included as an exception report. The criteria, or standard, for exceptions must be set by class code.			
R16	The system shall provide exception reports that highlight all units that exceed high and low values (set by class) for usage, maintenance cost per mile/hours, cost per quart, and miles/hours per gallon.	M		
R17	The system shall provide mechanic accountability report that details all direct and indirect work by mechanic for any defined period. The system shall provide selection criteria to restrict the data by repair facility, department, unit, or repair code (or any combination of these factors).	M		
R18	The system shall report actual hours of labor versus actual out-of-service for the work order and unit.	D		
R19	The system shall report mechanic and shop efficiency through comparison with user-defined standards for repair times by repair task and class.	D		
R20	The system shall provide reports indicating the status of claims and reimbursements for warranties on both parts and labor.	D		
R21	The system shall include usage report based on department calendars and class.	D		
R22	The system shall include usage report by unit number	D		

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	and class, showing totals, averages, and vehicles that are consistently below established standards and the month the vehicle was out of usage standard.			
R23	The system shall include usage report by vehicle.	D		
R24	The system shall be capable of recording out-of-service time, showing at least six user defined reasons for unavailability (e.g. down for maintenance, repair delay for parts, repair delay due to mechanic unavailability).	M		
R25	Cost per mile/hour by class must be readily available as a system generated standard report.	M		
R26	Cost per mile/hour by unit must be readily available as part of the equipment record and as part of a system generated standard report.	M		
R27	The system shall report out-of-service time by unit, by class, by department, by repair facility, and by user defined reason for unavailability.	M		
R28	The system shall include a parts activity report that lists parts ordered, received, overdue, returned, issued, adjusted, and transferred.	D		
R29	The system shall include a parts catalog activity report listing all new parts added and all parts deleted.	D		
R30	The system shall include a parts usage report by equipment unit.	D		
R31	The system shall include a	D		

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	parts-on-order report for more than a user definable number of days.			
R32	The system shall include a physical inventory report.	D		
R33	The system shall include a report of parts with on-hand quantity below the re-order point including number on order.	D		
R34	The system shall be capable of reporting all of the following reservation and activity information: department, account number, reservation requester, destination, driver name and license number, vehicle number, usage data, and pickup/drop off location.	D		
R35	The system shall be able to produce pool vehicle utilization report (total time rented compared to total time available) by pool vehicle class and location.	D		
R36	The system shall include standard reports for: reservations by status, daily reservation updates, upcoming reservations, overdue reservations, and reservation no-shows.	D		
R37	The system shall include a usage report by department, division, vehicle and repair location.	M		
R38	The system shall report all inspections due by vehicle location.	M		
R39	The system shall produce reports that identify components, (system), failures by user defined mileage increments.	M		

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R40	The system shall include reports for all inspections due by unit number and department.	M		
R41	The system shall provide actual versus estimated performance reports by employee.	D		
R42	The system shall provide actual versus standard labor hours reports by repair task code.	D		
R43	The system shall be capable of isolating all work of a specific type for any user defined period and restricting the analysis to any department and/or class of equipment.	D		
R44	The system shall include daily labor reports by employee.	M		
R45	The system shall include a report indicating work order type to facilitate analysis of road calls, quick fix, vandalism, operator abuse, accidents, etc.	M		
R46	The system shall include a report of all work orders open, at any or all locations, for user specified period of time.	M		
R47	The system shall include reports of work orders opened and closed, and their current status report by repair location.	M		
R48	The system shall include reports on sublet costs by vendor for parts and labor in repair type/task detail by equipment class.	D		
R49	The system shall include reports that isolate costs by repair reason for work and	D		

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	parts (e.g. for scheduled, unscheduled, road calls, accidents, etc.).			
R50	The system shall include work orders waiting for parts report.	M		

**Fuel (F)**

Section	Specification	Requirement (M)andatory or (D)esirable	Vendor Capability (Y)es, (C)ustomizatio n Required , (N)ot Available	Proposal Reference
F1	The system shall allow for integration with and accept data downloads from FuelForce.	M		
F2	The system shall be capable of interfacing with FuelForce.	M		
F3	The system shall include a meter error report after every download for validation and exception reporting for data transmitted from FuelForce.	M		

**Manpower/Labor Management (ML)**

Section	Specification	Requirement (M)andatory or (D)esirable	Vendor Capability (Y)es, (C)ustomizatio n Required , (N)ot Available	Proposal Reference
ML1	The software application shall create and maintain an electronic file/record for each mechanic, equipment operator, supervisor, and driver.	M		
ML2	The software application shall capture, store and report on all mechanics,	M		

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	equipment operators, supervisors, and drivers using unique identifiers.			
ML3	The application shall allow classification of employees based on individual and group job functions.	M		
ML4	The software application shall track and report on employee absences along with productive time and downtime for accurate calculation of performance.	M		
ML5	The software application shall manage various employee schedules, break periods, and overtime.	M		
ML6	The software application shall produce matrices showing the availability of employees: regular work schedules and overtime.	M		
ML7	The software application shall assign multiple mechanics, each with different labor hours, to a single service.	M		

**Training (T)**

Section	Specification	Requirement (M)andatory or (D)esirable	Vendor Capability (Y)es, (C)ustomization Required, (N)ot Available	Proposal Reference
T1	Provide detailed example of training agenda for each day of training. Include definition of types of employees to attend each training session.	M		
T2	PGW wishes to work as partners during the implementation of the system. Please list your company's implementation	M		

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	plan and associated costs.			
T3	<p>PGW wishes to have the training provided in three sessions:</p> <ol style="list-style-type: none"> <li>1. Beginner training using test data, so the staff may gain a better understanding of the systems functionality. This will be performed just prior to start-up of testing phase, approximately one month prior to live operations.</li> <li>2. Start-up training days prior to live operations, including the first days of live operations.</li> <li>3. Follow-up training scheduled for one to two months after live operations.</li> </ol> <p>Please list costs for this training approach based on your knowledge of PGW.</p>	M		

Technical (TE)

Section	Specification	Requirement (M)andatory or (D)esirable	Vendor Capability (Y)es, (C)ustomization Required, (N)ot Available	Proposal Reference
TE1	<p>The system documentation and design shall be compatible with the following standards:</p> <ul style="list-style-type: none"> <li>• IEEE 12207 – Standard for Information Technology – Software Life Cycle Processes</li> <li>• IEEE 1540 – Standard for Software Lifecycle</li> </ul>	M		

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	<p>Processes – Risk Management</p> <ul style="list-style-type: none"> <li>• IEEE 829 – Standard for Software Test Documentation</li> <li>• IEEE 1008 – Standard for Software unit Testing</li> <li>• PGW Development Standards</li> </ul>			
TE2	<p>Be compatible with PGW desktops. PGW desktops have Windows XP SP2, 2GHz, and 512 MB RAM.</p>	M		
TE3	<p>Be Compatible with PGW servers. All new PGW Windows servers are built on Windows Server 2003 R2 or the latest Windows Server software.</p> <p>We also support and even prefer software that runs on SuSe Linux 10.2</p>	M		