



Office of Physical Plant
Physical Plant Building
University Park, PA 16802-1118

January 13, 2025

To: Mercury Associates
RTA: The Fleet Success Company

Re: Request for Proposals
The Pennsylvania State University
Fleet Management Professional Services
Penn State Project No. 00-09870.00

A. INTRODUCTION AND BACKGROUND

The Pennsylvania State University (Penn State) is **requesting fee proposals** for Professional Services (the “**RFP**”) from **the short-listed firms above** to provide support to centralize fleet assets for the newly created Fleet Management Organization (FMO) that is expected to include all departments, twenty-four (24) campuses, and three (3) different maintenance and repair shops. At the beginning of this project, Penn State is expected to be onboarding an Associate Director of Transportation Services that will be in charge of the FMO. Penn State is also in the process of procuring a new Fleet Management Information System (FMIS) to help support the centralization of data and reporting. With this in mind, the professional will support the goals and objectives and execute the tasks outlined below.

B. GOALS AND OBJECTIVES

The primary goals and objectives of this project include, but are not limited to, the following:

1. Centralize Penn State’s owned and leased fleet assets into one database to increase efficiency and reduce costs through better management.
2. Provide a clear effective way for the travel costs to be explained and enforced. Assist in the implementation of a trip optimization tool that tracks departmental cost of rental vehicles, leased vehicles, owned vehicles, and mileage reimbursement and support policy that enforces the least expensive form of travel.
3. Automate existing workflows for fleet related tasks to reduce the burden and expense of labor while increasing the reliability of collected data. This will include working with many departments across Penn State including Accounting, Property Inventory, and Information Technology.
4. Establish efficient and effective record keeping enabling data driven decision making for the repair and maintenance of vehicles. Maintenance records for all vehicles would be housed in the FMIS and play a key role in understanding the total cost of ownership. Identify a method to reduce the downtime of assets and emergency repairs including a comprehensive management plan for maintenance.

5. Support and provide recommendations for the expansion of future combined services into one larger organization including maintenance and repair, fuel management, motor pools, and driver services in a phased approach that achieves centralization while minimizing the impact and costs to Penn State.
6. Effectively warehouse the information related to tracking assets during their lifecycle, from the time of purchase to the time of disposal in a centralized location and follow up with those that go unreported or do not comply with requirements of maintenance and repair and self-reporting.
7. Improve the environmental sustainability of Penn State's fleet by analyzation of the successes and weaknesses of the fleet assets.
8. Increase outreach and reporting to vehicle owners to better understand and more actively manage their assets.
9. Ensure that Penn State is meeting and exceeding fleet best practices in the upcoming organizational change.

C. SCOPE OF WORK AND DELIVERABLES

In general, the Professional's responsibilities for this project include, but are not limited to, the following:

TASK 1 - GENERAL

1. Utilize Penn State's **Trimble Unity Construct (formerly eBuilder)** for all project-related processes and document storage.

TASK 2 – OUTREACH AND ENGAGEMENT

1. Develop and support an outreach and engagement plan that encompasses all the owners of fleet assets at University Park and Commonwealth Campuses. The plan shall provide clear guidance and expectations on what the FMO means to the management of individual department assets.
2. Develop and support an outreach and engagement plan for the consolidation of fuel management, asset management, the implementation of an FMIS for all maintenance and repair shops, and all other recommended combined services. Support the combination of data from multiple systems into one FMIS from Penn State IT, using automated methods wherever possible.
3. Develop and present an initial outreach plan to Transportation Services that encompasses the necessity of centralization with a phased implementation plan for procurement, maintenance and repair, policies, and procedures, fuel management, and any other additional aspects of proposed fleet changes.

TASK 3 – POLICIES AND PROCEDURES

1. Ensure that policies and procedures created by the FMO match and exceed industry standards through a review process. Provide feedback on these policies that help align with Penn State's goals and objectives.

TASK 4 – DATA COLLECTION, ANALYSIS, REPORTS, AND METRICS

1. Develop and support processes to ensure data collection from the multiple fleet stakeholders is efficient and effective.
2. Develop and support processes for data analyzation and the creation of a standard Fleet Management report for each vehicle that includes utilization, total cost of ownership, and recommended future of each asset based off Penn State’s needs. This information should be integrated with departmental information on outside rental expenses and travel reimbursement.
3. Assist in the development and implementation of the FMIS that will drive data driven decisions on the future of the fleet including rightsizing, expansion of motor pools, purchasing and disposal, and the global view of Penn State’s Fleet.
4. Provide support and recommendations in developing key metrics to share in an annual report that shows the successes and challenges of a centralized fleet. The report should provide data about the overall health of the fleet, financial reporting, the size of the fleet, sustainability, and other metrics that guide the FMO.
5. Develop a fleet rate for individual assets that requires owners to pay actual costs of ownership including insurance, fuel, and fleet management.
6. Draft reports shall be developed for the following areas:
 - Annual sustainability report of the fleet.
 - Report by individual departments and vehicles regarding utilization. This report should provide information on the cost of ownership and make recommendations on alternative travel that may be more financially beneficial
 - A vehicle health report by department and individual vehicle that includes preventative maintenance
 - Provide a summary report of the need for a chargeback model related to fleet management that appropriately defines the cost of vehicle ownership and the need to require a charge for individual assets.
 - Annual report on the measurement of the overall benefits of fleet centralization from a financial, sustainable, and operational perspective.

D. MEETINGS

The following meetings are anticipated:

- A virtual meeting will be held with the selected firm prior to issuance of the agreement to confirm the scope of services and determine if any revisions to the response are necessary.
- Bi-weekly virtual progress meetings led by the professional will be held during the project.

The professional will be responsible for documenting and providing detailed meeting minutes within two (2) business days of the meeting.

E. SELECTION PROCESS AND SCHEDULE

Penn State will perform a two-step selection process for this project with two assessments: LOI and Request for Proposals (RFP). Interviews may be requested of the short-listed firms during the RFP selection process to help finalize the selection. Each assessment will be separate and distinct. The anticipated selection and project schedule is as follows:

- LOI Questions Due ~~12:00PM on October 25, 2024~~ **(completed)**
- LOI Submission Due: ~~12:00PM on November 4, 2024~~ **(completed)**
- RFP and Short-List Posted **January 13, 2025**
- **RFP Questions Due 12:00PM on January 31, 2025**
- RFP Responses Due **12:00PM on February 10, 2025**
- *Notice to Proceed: **March 10, 2025 (anticipated date)**
- Project Duration: 24 months with a phased approach

*We expect the services to start immediately following issuance of a fully executed professional agreement or upon receipt of a written Notice to Proceed.

F. RESPONSE REQUIREMENTS

If your firm is interested in pursuing this project, please email the information requested below in PDF format to khc3@psu.edu by the RFP submission deadline noted above in Section E. Please prepare your response in the order of the requested information to aid in the selection process. Proposals shall be provided in an 8 ½ x 11-inch format, a minimum of 11-point font, and limited to a cover letter plus **thirty (30)** single sided pages or **15** double sided pages. The cover letter, table of contents, and divider pages will not count towards the page limitation.

Please do not include any terms and conditions.

1. A one-page cover letter that includes the following:
 - a. Contact information (address, phone, and email) for your team's main point of contact.
 - b. A concise summary of why your team is best suited for this project.
 - c. Statement of certification that all information provided is accurate and that you concur, without exception, the terms, conditions, and provisions as contained in the latest version of Penn State's Form of Agreement 1-S.
2. **A detailed organization chart that clearly shows the roles and responsibilities of each team member proposed and the person who will be your point-of-contact for the project.**
3. **The scope of services that identifies the various tasks, deliverables, and meetings that will be provided on this project.**
4. **A description of the approach to performing this project, including the key technical items that will be considered and the potential issues and/or key drivers. Describe your expected support from Penn State.**

5. Describe key drivers to successfully achieve the goals and objectives of this project and how these drivers would be addressed by your team.
6. A detailed project schedule depicting the various tasks, meetings, and critical milestones for each phase. Allow two (2) weeks for Penn State review of the preliminary and final reports.
7. Proposed fixed fee for basic services, including the proposed hours for each team member per task and the total number of hours for each team member and the entire team for the project.
8. Not-to-exceed amount for reimbursable expenses associated with the fee above. Identify what type of expenses will be charged. Expenses, if applicable, shall be billed without markup. Please review section 7.2 Reimbursable Expenses in the attached "Form of Agreement 1-S" to determine if the compensation for Reimbursable Expenses will be included with Basic Services.
9. Professional's billable hourly rates

G. RESPONSE CONDITIONS

Penn State does not obligate itself to make the selection for these Professional services based on lowest cost and reserves the right to reject all responses. Penn State reserves the right to waive any informality in any or all responses, and to reject or accept any response or portion thereof. Our intent is to identify the firm(s) that provide the best fit with our perceived need. The firm(s) will balance quality, cost, and service.

Penn State will issue a Form of Agreement 1-S for the professional who is selected to provide the above services. In submitting a proposal for this project, the Professional is acknowledging that they concur with, without exception, the terms, conditions, and provisions as contained in Penn State's most current version of Form of Agreement 1-S which can be found under 00 52 00 PROFESSIONAL AGREEMENTS at:

<https://oppwiki.atlassian.net/wiki/spaces/OPPDCS/pages/5409499/Division+00+-+Procurement+and+Contracting+Requirements>

Please submit questions regarding the RFP via email to khc3@psu.edu by no later than the deadline above in Section E. If it becomes necessary to revise any part of this request an amendment will be issued to all firms who acknowledged interest in providing a response.

Sincerely,



Kurt H. Coduti, P.E.
Project Manager
Design and Construction Services
The Pennsylvania State University
101D Physical Plant Building
University Park, PA 16802
(814) 863-4960

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