REQUEST FOR PROPOSALS

RFP # 17-05-01

Heavy Equipment & Heavy Vehicle Purchase, Repair, & Rental

PART II

The Houston Independent School District (“HISD” and/or the “District”) is soliciting proposals for a 17-05-01 RFP /Heavy Equipment & Heavy Vehicle Purchase, Repair, & Rental as more fully set out in this Request for Proposals (“RFP”). One (1) hard copy original of the proposal, one (1) hard copy duplicate of the original, and two (2) USB drives of the proposal must be submitted in accordance with the instructions set out herein to:

Houston Independent School District
Board Services - Room 1C03
Attn: Demetria Thomas - Procurement Services
17-05-01 RFP /Heavy Equipment & Heavy Vehicle Purchase, Repair, & Rental
4400 West 18th Street
Houston, TX 77092

The following schedule and timelines apply to this RFP. The following timelines are subject to change at the District’s discretion:

<table>
<thead>
<tr>
<th>Timeline</th>
<th>Date/Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Release RFP</td>
<td>July 27, 2017</td>
</tr>
<tr>
<td>Pre-Proposal Conference</td>
<td>August 8, 2017 at 10:00 a.m., Conference Room 2E02, 4400 West 18th Street, Houston, Texas 77092</td>
</tr>
<tr>
<td>Last date for questions:</td>
<td>August 31, 2017, 5:00 p.m. CST</td>
</tr>
<tr>
<td>RFP Due</td>
<td>September 12, 2017, 10:00 a.m.</td>
</tr>
<tr>
<td>Evaluation Period</td>
<td>September 18, 2017 to September 22, 2017</td>
</tr>
<tr>
<td>Selected Proposal(s) Approved</td>
<td>November 9, 2017 (tentative)</td>
</tr>
</tbody>
</table>

Each set of the proposal must be submitted in a binder. The original proposal must be labeled “ORIGINAL” and contain original signatures. The copies of the original must be labeled “COPY.” Response submission must be delivered in a sealed folder or container (i.e. envelope, box, or
bin). If documents are submitted in an unsealed container or folder, the District is not responsible for any unsealed/unlabeled documents and materials.

Each binder and any container for the binder(s) must be labeled on the outside with the Proposer’s name, address, the RFP number and the RFP name. Each USB drive must be labeled with the RFP number and the vendor name.

Proposals will be received at the above address until September 12, 2017, 10:00 a.m., Central Standard Time. A pre-proposal conference will be held in conjunction with the RFP on August 8, 2017, 10:00 a.m., 4400 West 18th Street, Houston, Texas 77092, Conference Room 2E02. Submitting proposals prior to the pre-proposal conference is not recommended, and such proposals may be rejected by HISD. A more detailed timeline is set out in the Instructions, Submission Requirements and Procedures section of the RFP. Proposals will be reviewed as received in a manner that avoids disclosure to competing proposals. Contents of proposals will remain confidential during the negotiations period. Only the project [RFP] number and the identity of the Proposer(s) submitting the proposal will be made available to the public before award of the RFP.

Faxed or emailed proposals will not be accepted. Proposals must be submitted in sufficient time to be received and time-stamped at the above location on or before the proposal due date and time. HISD will not be responsible for proposals delivered late by the United States Postal Service, or any other delivery or courier services. Proposals received after the Proposal due date and time will not be considered. All proposals must remain open for one hundred twenty (120) days from the proposal due date pending acceptance by HISD.

The designated Sourcing Specialist during the proposal process shall be Demetria Thomas, Procurement Services, 4400 West 18th Street, Houston, Texas 77092, dthoma30@houstonisd.org. All communications pertaining to the RFP shall be addressed in writing to the Sourcing Specialist, as indicated in the next paragraph.

Questions concerning the RFP will be answered only if sent to the Procurement Services Department, in writing via email to dthoma30@houstonisd.org not later than 5:00 p.m. Central Standard Time August 31, 2017. All questions submitted in writing to the Sourcing Specialist prior to the deadline will be answered in the form of addenda. All addenda will be posted on the HISD Procurement website.

The General Terms and Conditions for Requests for Proposals governs this RFP and any contract(s) awarded under this RFP. This document can be downloaded and printed via HISD Procurement Services website or requested in hard copy format via email to Sourcing Specialist Demetria Thomas, at dthoma30@houstonisd.org. HISD will be entitled to assume that by submitting a Proposal, all Proposers have reviewed and consented to all provisions of the General Terms and Conditions.
The District will award this RFP to one or more supplier(s) based upon the evaluation of all proposals received. More details regarding the evaluation of proposals are included in Section II below.

Richard Gay

_________________________  ___________________________
Richard Gay, CPPO, Officer of Procurement Services  Date

July/27/2017
SECTION I: PROPOSAL RESPONSE REQUIREMENTS

The Proposal shall be submitted in a binder with tabs as set forth below:

**Title Page**
Show the RFP subject, the name of the Proposer’s firm, address, telephone number, name of contact person, and date.

- **Tab 1 – Table of Contents**
  Clearly identify the materials by sections and page numbers

- **Tab 2 – Proposal Submission Forms**
  Complete and return Forms A through P set forth in Part III of this RFP. The set of forms submitted in the proposal marked “ORIGINAL” requires original manual signatures. Copies of the forms bearing original signatures should be included in each additional proposal.

  The forms provided in Part III should be submitted in the following order:
  1. FORM A: Supplier Information (CHE (Local) Questionnaire)
  2. FORM B: MWBE Instructions and Participation Report
  3. FORM C: Reference Survey Instructions
  4. FORM D: Reference Survey
  5. FORM E: General Certifications
  6. FORM F: Price Schedule (should be placed in tab 7)
  7. FORM G: EDGAR Certifications
  8. FORM H: Exception Forms
  9. FORM I: Conflict of Interest Instructions and form CIQ
  10. FORM J: Instructions for Completion of Disclosure of Interested Persons Certification (HB 1295)
  11. FORM K: IRS Form W-9
  12. FORM L: Certificate of Insurance (Acord Form) or a letter from its insurance provider stating that Proposer can provide the levels of insurance required in this RFP.
  13. FORM M: Acknowledgement Form
  14. FORM N: “Sample” Master Services Contract (MSC)
  15. FORM O: CRIMINAL HISTORY BACKGROUND CHECK CERTIFICATION
  16. FORM P: 17-05-01 Checklist

- **Tab 3 – Profile of the Proposer**
  a. Indicate the key people in your organization assigned with a hierarchy chart to provide this service to the District and their level of experience and qualifications and the percentage of their time that will be dedicated to this project.
  b. Provide a list of the Proposer’s current top three clients and discuss services your organization has provided and/or performed for each client.

- **Tab 4 – Scope Section**
  Clearly describe the scope of the goods and/or services to be provided based upon the information in the Section II, Scope of Work.
• Tab 5 – Questionnaire Response —
  Respond to the questions and/or questionnaires included in the RFP.

• Tab 6 – Invoice Procedure
  a. Describe the proposer’s invoicing procedures.
  b. Include documentation identifying all of the Proposer’s fees.
  c. Payment terms. The District’s standard payment terms are 30 days after invoice is received.
     State any payment discounts that your company offers, i.e., 2% 10 days – net 30; or 5% 7 days – net 30.

• Tab 7 – Price
  Any and all pricing information, including any alternate pricing proposals that may be acceptable for some projects. Include a hard copy of Form F (Price Schedule) in this section, if applicable.

• Tab 8 – Addenda
  Insert all addenda under this section.

• Tab 9 – Criminal Background Check Form
  Insert one of the certifications that applies to your company:
    a. Criminal History Background Check Form - With direct contact with Students
    b. Criminal History Background Check Form – No direct contact with students
  (The supplier’s proposal will be considered non-responsive if the supplier fails to submit one of these Forms at the moment of submitting said proposal)
SECTION II: SCOPE OF WORK

2.1 SCOPE OF WORK:

At a minimum, the scope of services required by the successful firm shall consist of the following: Heavy Equipment Repair and Heavy Vehicle Purchase, Rental, Repair/Service and Maintenance; and Related Items.

The District intends to award this bid to a single or multiple firm(s) selected to provide the “best value” to HISD per section 2.5 Evaluation Factors.

The Houston Independent School District, with more than 215,000 students and encompassing 333 square miles within greater Houston, is the seventh-largest public school system in the nation and the largest in Texas.

Annually, for the past three fiscal years the District has spent an average of $108,706 for the purchase of heavy equipment repair/service and maintenance. The dollar value provided is no guarantee of what HISD intends to spend in the future. This amount can increase or decrease depending on the demand for these goods and services.

Houston Independent School District has heavy equipment consisting of approximately 14 various types, which will need required repairs, servicing, and replacing in the coming years. Therefore, the HISD is interested in receiving proposals for repairs, servicing and replacement of heavy equipment.

Other heavy equipment repair/service and maintenance; purchase and rental of equipment, and other related items not listed in the Scope of Work and on Form F: Price Schedule may be offered and listed on Form F: Price Schedule, on the tab labeled, Other Related Service & Equipment. HISD will make the final determination of award of any offers listed on this tab.

A standard agreement which results from this RFP shall be for a period of one (1) year from the effective date of the Agreement with an exclusive option by the District to renew on an annual basis thereafter for four (4) additional one-year terms.

This project will be awarded via a Master Services Contract. The Master Services Contract is included with this RFP as a reference and cannot be modified and must be signed after Board approval.

The supplier awarded a contract as a result of this bid must meet or exceed the following requirements and product specifications:

2.2 SPECIFIC CONDITIONS:

A. Potential suppliers responding to this Request for Proposal (RFP) must meet or exceed the following specifications for heavy equipment repair/service; and shall respond to each item listed below:

1. The Proposer shall be ASE certified in diesel and heavy equipment mechanics.
The supplier shall have all the resources necessary to supply the goods and services as specified in this Request for Proposal (RFP) to meet the needs of the District. Unit pricing shall include all labor, material, overhead and profit. The heavy equipment listed below is a representative sample. The heavy equipment listed may increase or decrease as needed to meet the District's need.

2. Proposer shall provide copy of certifications related to the repair services requested in this RFP, such as Heavy Equipment Repair Technician, Diesel and Heavy Equipment Repair Technician.

3. Proposer shall have the necessary tools and equipment to complete repair services and maintenance.

4. It is preferred that the Proposer be available to HISD for service during normal business hours: Sunday through Saturday during the hours of 7:00 AM to 5:30 PM, excluding holidays.

5. Proposer shall provide a 24 hour contact telephone number for emergency services.

6. Proposer shall have a location(s) in the Houston Metropolitan Area.

7. Maintenance, and Repair/Services shall be on-site at HISD locations listed below:

   **Delivery Address/ Site Locations and HISD Contact Telephone Numbers:**

   Barnett Bus Terminal: 6700 Winfree, Houston Texas  
   Phone number: (713) 847-4763

   Butler Bus Terminal: 6690 Carved Rock, Houston Texas  
   Phone number: (713) 726-2106

   Central Bus Terminal: 7700 Wallisville Rd., Houston Texas  
   Phone number: (713) 676-9313

   North West Transportation Center: 6351 Pinemount, Houston Texas  
   Phone number: (713) 613-3058

   Truck Service Center: 228 McCarty Drive, Houston, Texas  
   Phone number: (713) 676-9323

8. For repair/services that cannot take place on-site; the Proposer shall have the proper means of moving/hauling the equipment to the vendor’s location. The Proposer shall provide location address where off-site repairs will be done.

9. HISD Fleet Operations reserves the right to amend the list of equipment at any time as fleet inventory may increase or decrease. The HISD Heavy Equipment Inventory list has been posted with this RFP: 17-05-01 HISD Heavy Equipment Inventory.

10. The awarded vendor(s) shall provide a quote and timeframe prior to rendering any repairs/service/maintenance on HISD’s equipment.

11. All repair/service shall be performed by vendor’s staff. Any sub-contracting of work must be
approved by the Fleet Operations Senior Manager prior to work being performed.

12. Proposer shall describe your company’s warranty on labor and parts that will be provided to HISD.

13. HISD Senior Manager of Fleet Operations and the Evaluation Cross-Functional Team will visit the site(s) of the top four ranking vendors to inspect the vendor’s equipment before an award is made.

2.3 SPECIFICATIONS:

A. Proposer shall be able to provide fleet maintenance services, and repair services on a variety of equipment to include, but not limited to the following items listed below: Grading Equipment, Agricultural /Farm Type Equipment, Wood Chippers, Paving Equipment, Concrete Mixers, Trailers, and Dump Trucks: International, Freightliner, Volvo and Chevy; and the Proposer shall describe in detail in your proposal the protocols for the performance of these services, and/or how your company will provide the following repair/services/maintenance:

1. Fleet Maintenance Services

Fleet Maintenance Services shall include but it not limited the following:

   a. Proposer shall provide a warranty for each repair.
   b. Proposer shall provide all factory recommended preventive maintenance services as described per the original equipment manufacturer e.g. (oil changes, tune-ups, etc.).
   c. Proposer shall provide all incidentals and parts required for preventive maintenance (fluid, belts, hoses, etc.).
   d. Proposer shall provide a list of recommended maintenance service intervals e.g. (alternators, engines, transmissions, wheel alignment, etc.).

2. Repair Services shall include but is not limited to:

   a. Travel to equipment/Road services, diagnose the equipment, provide itemized quote prior to rendering any services, make the necessary repair(s) disassemble parts, replace broken parts and reassemble equipment.

B. Fleet maintenance services, and repair services on a variety of equipment to include, but not limited to the following:

1. Grading Equipment

   a. Mustang Caterpillar Motor grader 12M
   b. Mustang Caterpillar Motor grader 120G
   c. Leeboy Grader 120G
   d. Kamatsu Loader WA250-SL
   e. Backhoe: Case, New Holland, Caterpillar, John Deere
   f. Bobcat Skid Loaders
2. **Agricultural / Farm Type Equipment**  
   a. John Deere 6310 w/ side arm mower  
   b. New Holland with sidearm mower  
   c. Ford 3930 Tractor  
   d. Kubota 108s with sidearm mower  

3. **Wood Chipper**  
   a. Vermeer Chipper BC 1800XL  
   b. Stump Grinder  

4. **Paving Equipment**  
   a. Hamm Steel Wheel Roller  
   b. Ingersoll-Rand Traffic Paver  
   c. Wacker Packer Roller  
   d. Blaw-knox Asphalt Paver  
   e. Asphalt Paver  
   f. Paving Compactor  
   g. Power Buggy  

5. **Concrete Mixer**  
   a. Multi Grip  

6. **Trailers**  
   a. Trail King  
   b. Interstate  
   c. Load King  
   d. Wells Cargo  

C. Pricing for repair services and catalog discount off parts and supplies shall be entered on Form F Price Schedule, on the tab labeled: Hourly Rate & Catalog Discount.  

D. HISD is also requesting pricing for the purchase and rental of heavy equipment for the exact item or the equivalent item as well as discount off equipment purchase and rental. Pricing for these items shall be entered on Form F Price Schedule, on the tab labeled: Purchase & Rental of Equipment.  

E. **Other Related Services & Equipment**  
   1. Other related services and equipment may be offered. The pricing for these items shall be entered on Form F Price Schedule the tab labeled: Other Related Services & Equipment.  

Continue to the next page...
2.4 COST:

Price is to remain firm/fixed for the term of the contract. Price is to be provided on Form F and inserted in Tab 7.

2.5 EVALUATION FACTORS: The evaluations committee will conduct a comprehensive, fair and impartial evaluation of all proposals received in response to this RFP. Each proposal received will be analyzed to determine overall responsiveness and completeness as defined in the scope section and in the instructions on submitting a proposal. Failure to comply with the instructions or to submit a complete proposal may deem a proposal non-responsive and may at the discretion of the Evaluation Committee be eliminated from further evaluation.

If the evaluation committee has reasonable grounds to believe that the Proposer with the highest ranking score is unable to perform the required services to the satisfaction of HISD, HISD reserves the right to make an award to another proposer who in the opinion of the evaluation committee would offer HISD the best value. Some indicators (but not a complete list) of probable supplier/proposer performance concerns are: past supplier performance; the proposer’s financial resources and ability to perform; the proposer’s experience or demonstrated capability and responsibility; and the supplier’s ability to provide a reliable on-going business relationship and the maintenance of on-going agreements and support.

<table>
<thead>
<tr>
<th>Criteria #</th>
<th>Criteria Description</th>
<th>Weighted Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>the purchase base price</td>
<td>30%</td>
</tr>
<tr>
<td>2</td>
<td>the reputation of the Proposer and of the Proposer’s goods or services</td>
<td>10%</td>
</tr>
<tr>
<td>3</td>
<td>the quality of the Proposer’s goods or services</td>
<td>10%</td>
</tr>
<tr>
<td>4</td>
<td>the extent to which the goods or services meet the District’s needs</td>
<td>10%</td>
</tr>
<tr>
<td>5</td>
<td>the Proposer’s past relationship with the District</td>
<td>10%</td>
</tr>
<tr>
<td>6</td>
<td>the impact on the ability of the District to comply with laws and rules relating to historically underutilized businesses</td>
<td>10%</td>
</tr>
<tr>
<td>7</td>
<td>the total long-term cost to the District to acquire the Proposer’s goods or services</td>
<td>10%</td>
</tr>
<tr>
<td>8</td>
<td>for a contract for goods and services, other than goods and services related to telecommunications and information services, building construction and maintenance, or instructional materials, whether the supplier or the supplier’s ultimate parent company or majority owner: (A) has its principal place of business in this state; or (B) employs at least 500 persons in this state</td>
<td>0%</td>
</tr>
<tr>
<td>9</td>
<td>any other relevant factor specifically listed in the request for bids or proposals.</td>
<td>10%</td>
</tr>
</tbody>
</table>
2.6 QUESTIONNAIRE: Please include responses to the following in Tab 5 of the proposal response:

1. Proposer shall provide a copy of your company’s certification(s) and list the type of certifications.

2. Does your company offer mobile services (Mobile Service for locations throughout HISD other than those listed above in 2.2 Specific Conditions, number 7? If so, the Proposer shall describe your mobile service program. Proposer shall provide the number of service repair technicians available to HISD for the mobile service program? Pricing for these services shall be entered on Form F Price Schedule, tab: Hourly Rate & Catalog Discount line item 11, and line item 11 (a) if applicable.

3. For repair/services that will not be done at HISD sites; the Proposer shall provide the location(s) address where off-site repairs will be done.

4. What is your company’s mechanic to equipment ratio?

5. What is your company’s response time to a services call?

6. What is your company response time to emergency calls? What is the emergency contact number?

7. Provide the number of locations that will be available to HISD if an award is made to your company.

8. How many years has your company been doing business with HISD? Describe your business relationship with HISD.

9. Proposer shall describe your company’s warranty on labor and parts that will be provided to HISD.
2.7 PRICING SHEETS INCLUDING ELECTRONIC SUBMITTAL REQUIREMENTS.

This section intentionally left blank.

Continue to the next page...
2.8 Supplier Performance Evaluation:

Key Performance Indicators will be used to track the awarded supplier(s)’ performance.

1. Supplier Performance Evaluation Criteria:

   a. The following areas may be evaluated quarterly, annually, or as needed by the user department Transportation Services, schools, and other departments:

      • Quality of Product/Service
      • Delivery of Product/Service
      • Customer Service
      • Accuracy of Price
      • Comments and/or Concerns
      • Site Visits
      • Quarterly Meetings
      • Response Time