# E100249-2023 RFP FACILITY UTILITY VEHICLES

SCOPE DOCUMENT

RESPONSE DUE DATE – FRIDAY, AUGUST 18, 2023 (1 PM ET)
Contents

1. General Overview ................................................................................................................. 3
   1.1 Project Overview and Objectives ..................................................................................... 3
   1.2 Contract Volume Estimates .............................................................................................. 3

2. Standard RFP Provisions ........................................................................................................ 3
   2.1 RFP Deadline .................................................................................................................. 3
   2.2 Tentative Schedule of Key Events .................................................................................. 3
   2.3 Evaluation Process and Criteria ..................................................................................... 3
   2.4 Sole Point of Contact for the RFP .................................................................................. 4

3. Scope of Products and Services ............................................................................................. 5
   3.1 Transportation Vehicles: ............................................................................................... 5
   3.2 Maintenance Vehicles: .................................................................................................... 5
   3.3 Specialized Vehicles: ....................................................................................................... 5
   3.4 Accessories & Equipment: ............................................................................................. 5
   3.5 Services: ........................................................................................................................ 5
   3.6 No Exclusions: ............................................................................................................... 5

4. Pricing ................................................................................................................................... 6

5. Appendix ............................................................................................................................... 6
   5.1 Definitions ....................................................................................................................... 6
1. General Overview

1.1 Project Overview and Objectives

E&I Cooperative Services, Inc. ("E&I") is requesting proposals for Facility Utility Vehicles to result in a contracting solution for use by its Members. E&I is committed to utilizing purchasing and business practices in accordance with the National Association of Educational Procurement Code of Ethics.

The primary goals and objectives of E&I are to:

1) assist our Members to obtain the absolute lowest cost and best value that exceeds other public sector consortia agreements,
2) establish a strategic sourcing partnership with any selected manufacturer(s) and authorized dealers, and
3) enhance our position as the premier Procurement Cooperative for Education.

1.2 Contract Volume Estimates

Based on similar contracts, the estimated value of transactions resulting from contracts from this RFP is anticipated to be ~$30M across 5 years. The value potential has been determined based on market size and likely contract penetration. It is intended to be a directional input for our future business partners and not a volume commitment.


2.1 RFP Deadline

E&I will accept proposals submitted in response to this RFP only on the Jaggaer tool until 1:00 PM EST, on August 18, 2023 (the "Submittal Deadline"). The timeline for the RFP can be found in Section 2.2

2.2 Tentative Schedule of Key Events

The following is a tentative schedule of events for this RFP:

<table>
<thead>
<tr>
<th>Activity</th>
<th>Planned Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request for Proposal issued (&quot;Open Date&quot;)</td>
<td>07/19/2023</td>
</tr>
<tr>
<td>5 PM ET Deadline for submission of RFP–related written questions (&quot;Q&amp;A Submission Close Date&quot;)</td>
<td>08/09/2023</td>
</tr>
<tr>
<td>E&amp;I Response to RFP-related questions</td>
<td>08/10/2023</td>
</tr>
<tr>
<td>1 PM ET Deadline for Receipt of Proposals (&quot;Close Date&quot;)</td>
<td>08/18/2023</td>
</tr>
<tr>
<td>Evaluation and Supplier Clarifications Begin</td>
<td>08/21/2023</td>
</tr>
<tr>
<td>Negotiations Begin with Shortlisted Suppliers</td>
<td>09/22/2023</td>
</tr>
<tr>
<td>Anticipated Award(s)</td>
<td>10/13/2023</td>
</tr>
<tr>
<td>Acceptance and Execution of Agreement</td>
<td>10/27/2023</td>
</tr>
<tr>
<td>Implementation</td>
<td>11/03/2023</td>
</tr>
</tbody>
</table>

2.3 Evaluation Process and Criteria

Any contract(s) resulting from this Request for Proposal will be awarded in writing to responsive and responsible Respondents whose proposal, in the opinion of the evaluation team, offers the greatest benefit to our members when considering the total value including the quality, service levels, customer service and total cost (including any trade, prompt payment discounts, and other miscellaneous charges).

All proposals should be complete to be considered responsive.

As part of the evaluation process, E&I may require a demonstration/presentation before the award is made and the demonstration/presentation may be considered as an additional factor in the award. In addition, E&I may decide to make site visits, as needed, during the evaluation process which shall be coordinated with the respective Respondent(s).

The RFP evaluation team will review and evaluate RFP responses according to the following weighted criteria based on a total of 100 points.
<table>
<thead>
<tr>
<th>No.</th>
<th>Criteria</th>
<th>Criteria Overview</th>
<th>Points</th>
</tr>
</thead>
</table>
| 1   | Contract Alignment & Connection |  ● Contract connection process to Member  
     |                                  |  ● Contract channeling to E&I (direct, net new, etc.)                               | 10     |
| 2   | Supplier Diversity              |  ● Certifications and Designations  
     |                                  |  ● Company Program and Overall Commitment to Supplier Diversity  
     |                                  |  ● Reporting, Metrics, & KPI’s                                                    | 10     |
| 3   | Supplier Capability             |  ● Company Experience  
     |                                  |  ● Service Capability  
     |                                  |  ● E-Procurement  
     |                                  |  ● Performance Tracking & Reporting  
     |                                  |  ● Quality Management  
     |                                  |  ● Training, Support & Account Management  
     |                                  |  ● Compliance                                                                    | 20     |
| 4   | Economic Value and Financial     |  ● Contract Administrative and Marketing Fee (CAF)  
     | Overview                        |  ● Financial Offer Requirements & Proposal  
     |                                  |  ● Financial Reporting Capabilities                                              | 25     |
| 5   | RFP Exceptions                  |  ● Supplier Performance Expectations  
     |                                  |  ● Compliance with RFP specifications                                             | 10     |
|     |                                  |  ● Compliance with Master Agreement terms & conditions  
     |                                  |  ● Compliance with Members’ institutional policies, federal, state, and local    |        |
|     |                                  |  legal and regulatory requirements and policies                                     |        |
| 6   | E&I Risk Profile                |  ● RFP response quality  
     |                                  |  ● Litigation                                                                    | 10     |
|     |                                  |  ● Financial Health                                                               |        |
|     |                                  |  ● Existing contracts with direct competitors                                      |        |
| 7   | Scope Questions                 |  ● Questions related to the scope of the RFP                                      | 15     |

2.4 Sole Point of Contact for the RFP

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Respondents to this RFP or persons acting on their behalf shall not contact any E&I employee, officer, or agent; any E&I Board of Directors; or any E&I Member concerning any aspect of this RFP, except in writing to the Sole Point of Contact, from the date of release of this RFP through the official award date. Violation of this provision may be grounds for rejecting a proposal response. See Section 2.7 in the Cover Letter on how to submit questions.
3. Scope of Products and Services

E&I is seeking proposals from qualified, experienced, financially sound, and responsible Facility Utility Vehicle providers for its members across the United States. E&I desires the broadest possible selection of Utility vehicles being offered over the largest possible geographic area and to the largest possible cross-section of E&I's current and future Members. The intent of this solicitation is to provide E&I Members with a comprehensive offering of facility utility vehicles including golf carts, low-speed vehicles (LSV), passenger shuttles, snowmobiles, and campus-use vehicles.

Qualified suppliers are invited to propose comprehensive offerings of Facility Utility Vehicles, along with accessories, equipment, and services related to their utilization. The vehicles should be able to provide members with efficient in-house transportation service within the educational campuses and ensure effective completion of tasks such as landscaping, snow removal, etc. resulting in better operational efficiency of the institutes. E&I is looking to provide the following types of vehicles for its members for various campus needs, including but not limited to:

3.1 Transportation Vehicles:
The Supplier should provide the below transportation vehicles for campus use:
- Golf carts
- Low-speed vehicles (LSV)
- Passenger shuttles
- Campus-use vehicles
- Specialized Vehicles
- Any other

3.2 Maintenance Vehicles:
The Supplier should provide the below maintenance vehicles for campus use
- Landscaping vehicles
- Snow removal vehicles/equipment
- Any other

3.3 Specialized Vehicles:
The Supplier should provide the below specialized vehicles for campus use
- Groundskeeping equipment (e.g., turf sprayers, mowers)
- Material handling equipment (e.g., pallet jacks, scissor lifts)
- Other utility vehicles tailored to specific operational needs
- Any other

3.4 Accessories & Equipment:
- Attachments for utility vehicles (e.g., cargo beds, snowplows)
- Safety equipment (e.g., lights, horns, mirrors)
- Charging stations or infrastructure for electric vehicles
- Any other accessories or equipment relevant to the operation and maintenance of the vehicles
- Any other

3.5 Services:
- Delivery and setup of vehicles and equipment
- Maintenance and repair services
- Training programs for vehicle operation and maintenance
- Provision of spare parts and consumables
- Any other related services to ensure the optimal performance and longevity of the vehicles.

Suppliers are expected to provide an exhaustive list of vehicles they are willing to provide to E&I Members.

3.6 No Exclusions
No products, or services provided by your company have been excluded from this RFP. All products, supplies and accessories carried in a Respondent’s catalog(s), price book(s) or otherwise available by special order are part of this solicitation.
4. Pricing
Supplier must complete the ‘Pricing Sheet’ and upload it on the Jaggaer tool. The first tab ‘Instructions’ in the ‘Pricing Sheet’ lists out the different sections and pricing requested by E&I. Please ensure to review the ‘Instructions’ tab before you start filling in the pricing.

5. Appendix
5.1 Definitions
The following are the definitions of general terms used in this RFP.

**DAYS:** All days specified are based on calendar days unless otherwise noted.

**EDUCATION:** The combination of Higher Education and K-12.

**GO TO MARKET:** Strategy or action plan specifying how the Respondent will utilize its inside and outside resources (e.g. sales force and distributors, marketing initiatives, etc.) to deliver its products and/or services to the Education market through an E&I contract.

<table>
<thead>
<tr>
<th>Contract Region Key</th>
<th>States</th>
</tr>
</thead>
<tbody>
<tr>
<td>Northeast</td>
<td>CT, MA, ME, NH, NY, RI, VT</td>
</tr>
<tr>
<td>Mid-Atlantic</td>
<td>DC, DE, MD, NJ, PA, VA, WV</td>
</tr>
<tr>
<td>Southeast</td>
<td>AL, FL, GA, KY, MS, NC, SC, TN</td>
</tr>
<tr>
<td>Central</td>
<td>AR, IA, KS, LA, MN, MO, ND, NE, OK, SD, TX</td>
</tr>
<tr>
<td>Great Lakes</td>
<td>IL, IN, MI, OH, WI</td>
</tr>
<tr>
<td>Western</td>
<td>AK, AZ, CA, CO, HI, ID, MT, NM, NV, OR, UT, WA, WY</td>
</tr>
</tbody>
</table>

**GREATEST BENEFIT:** The decision for award will be based on an overall combination of variables such as quality, price and various elements of required service that in total are optimal relative to the needs of the E&I Membership.

**HIGHER EDUCATION:** All Universities, Colleges, Healthcare Facilities (private and public), i.e., Associate, Bachelor, Master, and/or PhD in the United States, that provide for advanced learning and/or grant degrees. These Universities, Colleges and Healthcare Facilities may or may not be members of E&I.

**HUBS:** Historically Underutilized Businesses e.g., minority, women-owned businesses (for the State of Texas, Certified HUBS within the State of Texas).

**K-12:** All School Systems and Districts (private and public) in the United States that provide education for students in Kindergarten through 12th Grade. These School Systems and Districts may or may not be members of E&I.

**MANUFACTURER:** Indicates an entity that makes the products from raw materials outlined in this RFP, all of its agents, and employees.

**MAY:** Indicates something that is not mandatory but permissible/desirable.

**MEMBERS:** Includes Institutions, Universities, Colleges (private and public) and K-12 schools that are listed in the E&I record.

**MONTH END:** Shall mean the last calendar day of each month.

**MOST RESPONSIBLE:** A Respondent whose reputation, past performance, and business and financial capabilities are such that the Respondent would be deemed most capable of satisfying Member needs for a specific contract.

**MUST, SHALL, WILL:** The words “shall,” “must,” or “will” are equivalent and indicate mandatory requirements or conditions. E&I will not waive Responder’s material deviation from any of the mandatory requirements.

**RMWBE:** Minority, Woman-owned Business Enterprises.

**NATIONAL AGREEMENT:** E&I awards an Agreement which is available throughout the United States (including Alaska and Hawaii).

**REGIONAL AGREEMENT:** E&I may elect to award an Agreement by Geographical Areas of the United States. See table below for geographic breakdown:

**RESPONDENT:** Entity who submits a proposal to an RFP.

**RESPONSIBLE:** A Respondent is responsible if they are capable or qualified to perform the work.

**RESPONSIVE:** A proposal is responsive if it meets all of the requirements of the RFP.
**SHALL, MUST, WILL:** Indicates a mandatory requirement(s) that must be addressed. Failure to address these mandatory requirements will result in rejection of your proposal as non-responsive. E&I may, but is not required to, reserve the right to request additional information.

**SHOULD:** Indicates something that is recommended but not mandatory. If the Respondent fails to provide recommended information, E&I may, at its sole option, ask the Respondent to provide the information or evaluate the proposal without the information.

**SOLE POINT OF CONTACT:** The Contract Manager or designee to whom Respondents shall address any questions regarding the solicitation or award process. The sole point of contact shall be the arbitrator of any dispute concerning performance of the Contract.

**SUCCESSFUL RESPONDENT:** The Respondent(s) or individual(s) who are the recommended recipient(s) of the award of a contract under this RFP (also synonymous with “Payee,” “Offeror,” “Contractor,” “Vendor,” and “Supplier”). If a Respondent is a manufacturer, its certified dealers and resellers may also furnish products under the Contract; in choosing to do so, the dealers and resellers agree to honor the Contract and the term “contractor” shall be deemed to refer to them. Unless awarded the Contract as a direct Respondent, however, dealers and resellers are not parties to the Contract, and the Respondent that certifies them shall be responsible for their actions and omissions.

**SUPPLIER:** Indicates an entity that distributes/furnishes the products and or services of a company, all of its agents, and employees. For the purposes of this RFP, the terms Supplier and Respondent may be used interchangeably.