



Proposal to Provide Consulting Services To:

Rowan County



March 2023

TRANSMITTAL LETTER

March 2, 2023

To: Aaron Church, County Manager
From: Ron Hall, Partner, CST Fleet Services
Subject: Fleet Management Consulting Services

CST Fleet Services, based in Clemmons, NC, is pleased to provide this proposal to assist Rowan County in an audit of fleet management services. Our team works with government fleets in North America to identify, define, and implement vehicle asset cost savings. Members of our team have extensive experience assessing the full range of fleet operations functions including policies, organization design and staffing, maintenance, fuel, technology, and systems, etc. We previously develop the RFP for outsourcing maintenance for the county.

Our Team has decades of experience in the fleet management field and are among the most experienced consultants in the industry. As all our staff are located in North Carolina, we can provide Rowan County with an unmatched level of support on this project. The Project Manager will be;

Ron Hall
1325 Central Road
Clemmons, NC 27012
(336) 287-8348
rhall@carolinast.com

As Partner of CST Fleet Services, and an Officer of the Corporation, I am pleased to authorize the transmittal of this proposal to accomplish the work with Rowan County. I certify that the company provides independent and unbiased consulting services.

This proposal shall be in effect for 90 days.

Our Team is enthusiastic to provide our skills and expertise to Rowan County.

Sincerely,



Ron Hall, Partner

ORGANIZATIONAL OVERVIEW

CST Fleet Services specializes in identifying, implementing, and teaching cost savings initiatives for vehicle-based assets operated by government and private fleets in North America. CST work has yielded proven and measurable results which are founded upon:

- **Industry best practices accumulated over several decades of experience,**
- **Metrics and industry benchmarking,**
- **Proven and measurable scenario modeling and forecasting tools (including the evaluation of fleet rightsizing efficiency gains), and**
- **Fluid and dynamic approach to projects.**

CST was formed in 2000 as Carolina Software Technologies, Inc., a North Carolina-based corporation. One of its founding partners and current Vice President, Ron Hall, has over 25 years of experience working in various capacities within the fleet community. Current President, Hayes Smith, joined CST in 2011 after serving as a Senior Project Specialist for the City of Winston-Salem Utilities Division.

CST was initially founded as a launching entity for fleet metric software packages, which have become very successful. The metric packages, referred to as “The Value Indicators”, are utilized by over 75 private and government fleets in North America. Over the years, CST’s work and experience led to the foundation of ‘industry best practices. This evolved as a tool for fleet management and provided CST insight regarding fleet management. CST staff discovered that, by working with their customers, our experience could be taught and passed along to customers with the goal of establishing proven and measurable cost savings. As such, CST evolved from a software company to a consulting company.

CST has established relationships with numerous fleet customers to develop new and proven cost savings initiatives. Most notable clients include the following government and private fleets:

University of Kentucky	Georgetown University, Washington, DC
City of Houston, TX	New York City, NY
City of Chicago, IL	City of Dallas, TX
City of San Diego, CA	City of Greensboro, NC
FedEx, Memphis, TN	City of Long Beach, CA
City of St. Johns, NS, Canada	Ryder Systems, Miami, FL
Chicago Transit Authority, IL	Cook County, IL
City of Tulsa, OK	City of Richmond, VA
DeKalb County, GA	City of Springfield, IL
Calpine Gas, Houston, TX	County of Arlington, VA
FedEx	Southern California Gas, CA
UPS	San Diego Gas and Electric, CA
State of Indiana	State of Oklahoma
City of Raleigh, NC	City of Atlanta, GA

CST has a long and successful history of providing consulting services to private, state, and municipal vehicle fleets. Their projects have ranged from short-term engagements developing recommendations for specific fleet operations or vehicle types, to longer-term fleet support of implementation and performance tracking for recommended measures.

TECHNICAL PROPOSAL

PROJECT UNDERSTANDING

Rowan County has outsourced fleet maintenance to Vector for over a year to date. CST will perform an audit of the contract and services provided. This audit will encompass reviewing data, onsite visits, and preparing an audit report of the maintenance Vector has provided.

WORK PLAN

The tasks that we propose to complete during this project are as follows:

From a high level, CST can assist in the auditing/monitoring and support of the outsourced maintenance to Vector by performing the following tasks:

- 1) Reviewing maintenance records for completeness
- 2) Reviewing summary reports
- 3) Evaluating timeliness of repairs
- 4) Reviewing PM compliance
- 5) Evaluating actual cost vs contract charges
- 6) Reviewing invoices (Target vs Non-Target)
- 7) Spot checking repair records for reasonability checks
- 8) Onsite visit - to look at Vector (contractor operations).
- 9) Onsite visit - to have a focus group session with large users.
- 10) Evaluate parts room and parts availability of the shop.
- 11) Prepare an Audit report.
- 12) Creating list of recommended vehicles to replace for the upcoming budget.
- 13) Creating future suggested budget for vehicle replacement (next 10 Years).
- 14) Reviewing fleet policies and procedures
- 15) Review replacement, utilization, technology, etc.
- 16) Prepare an estimate for bringing in house software, manager, technicians, parts, training etc.)
- 17) Evaluate the potential use of intergovernmental agreements to perform maintenance if needed (Possibly Salisbury).
- 18) Surveying customers (departments) for satisfaction (Google Survey, Survey Monkey, Email, etc.)
- 19) Prepare an Audit/Project presentation.

Note: Excel spreadsheets and documents created during the project will be made available to Rowan county for reference and future use.

Project Schedule

Project is expected to be completed within 2 months of contract award date.

Payment Schedule

We are prepared to offer our services for the firm fixed price of \$35,000. Below is breakdown of the payment schedule.

Task	Payment
Project Kick off	\$8,750.00
Onsite Interviews Completed	\$8,750.00
Audit Report Completed	\$8,750.00
Project Completed (Final Presentation)	\$8,750.00
	\$35,000.00

Project Team

The principal members and roles of our proposed project team are as follows:

RON HALL is a partner of CST Fleet Services and focuses on the firm's data modeling activities including life-cycle cost analysis, fleet rightsizing, and "what if?" modeling. Mr. Hall is also responsible with co-partner for day-to-day operations of corporation. He has 20 plus years of fleet consultant and oversees all the services offered by the company. Prior to joining CST Mr. Hall worked for Eaton and as Director of Software Development for Noregon Corporation to develop custom diagnostic, maintenance, and telematics solutions to support the fleet industry. He holds a master's degree in Mathematics from Virginia Tech University.



Danielle Hall joined CST Fleet Services in 2018, bringing with her a strong set of analytical skills. Since being with CST, she has worked on projects for Nebraska DOT, City of Orlando, City of San Antonio, Santa Clara, CA, Long Beach, CA, Conoco Phillips, Apex NC, and George Mason University. Her primary focus with CST Fleet Services has been in performing data analysis and modeling of fleet data in the areas of right sizing, lifecycle analysis and resource planning. In addition, she develops process and workflow diagrams that provide our customers with visual representations of both their current operations as well as recommended process changes.



Randy Owen, CAFM is Senior Fleet Consultant for CST Fleet Services and is located in Charlotte, NC. He has 25 years of experience as a fleet manager and fleet management consultant and is a nationally recognized expert in fleet management best practices and in the areas of fleet management outsourcing and managed competition. His areas of expertise also include fleet utilization analysis and rightsizing, and performance measurement and benchmarking. Before co-founding Mercury Associates, Mr. Owen was a Senior Manager in Maximus, Inc. Prior to this he served as the fleet manager for the City of Charlotte and for the Los Angeles County Department of Public Works and worked as an independent consultant. He holds a master's degree in Political Science from the University of California at Los Angeles.



ATTACHMENT A – KEY CST TEAM STAFF RÉSUMÉS

Ron Hall, Consultant, CST Fleet Services

QUALIFICATIONS

Accredited Institutions

B.S. Computer Science, Mathematics, Virginia
Polytechnic University, 1984

Employment

CST Fleet Services (2000 - present)
Noregon Systems (1996 - 2000)
Eaton Corporation (1984 - 1996)

EXPERIENCE

Mr. Hall is Co-Partner and President of CST Fleet Services. He is responsible with co-partner for day-to-day operations of corporation. He oversees all the services offered by the company, including;

- Municipal or Private Fleet Consultants and Fleet Consulting Services
- Emissions Level and Carbon Footprint Forecasting
- Fleet Manager's "What If..." Modeling
- Fleet Consolidation
- Strategic Vehicle Parts Partnership
- Fuel Management
- Enterprise Fleet Management

As Director of Software Development for Noregon Corporation, Mr. Hall was responsible for a staff of 50 engineers. He established and maintained the technical direction for Noregon and personally managed major fleet accounts. Noregon developed custom diagnostic, maintenance, and telematics solutions to support the fleet industry. Activities included;

- Creating proposals for opportunities
- Negotiating and procuring contracts
- Creating and managing a formal program plan, schedule, and budget for each project
- Creating and managing the requirements and technical direction for the project
- Tracking the progress to the project weekly for management, customer, and team
- Managing the software development cycle and technical direction of the projects
- Managing the integration of new systems into the customers current system infrastructure
- Negotiating the requirements with the customer, management, and team

Mr. Hall's responsibilities as lead engineer at Eaton Corporation. He spent half of his time managing the project with the fleet and half of the time as the principal engineer for the project. Projects included from diagnostic applications, on-board computers, braking system, transmission system and information analysis systems for the fleet industry. Activities included;

- Jointly defining goals and potential projects for short- and long-term
- Creating scope for new fleet projects
- Reviewing projects with fleets and getting approval
- Deploying and testing concepts
- Taking new fleet products to market
- Working with fleets to improve business practices using products and new technologies.

Danielle Hall, Analyst, CST Fleet Services

QUALIFICATIONS

Accredited Institutions

B.S. Business Administration
University of North Carolina Greensboro, 2018

Employment

CST Fleet Services (2018 – Present)

EXPERIENCE

Ms. Hall joined CST Fleet Services in 2018. bringing with her a strong set of analytical skills. Since being with CST, she has worked on projects for;

- Nebraska DOT
- City of Orlando
- City of San Antonio
- Santa Clara, CA
- Long Beach, CA

Her primary focus with CST Fleet Services has been in performing data analysis and modeling of fleet data in the areas of right sizing, lifecycle analysis and resource planning. The data models she produces are used to analyze fleet and provide further knowledge into data. These models include;

- Capital Planning
- Right sizing
- KRSD (Keep, Replace, Share, Dispose)
- Asset Utilization
- Lifecycle Planning

In addition, she develops process and workflow diagrams that provide our customers with visual representations of both their current operations as well as recommended process changes.

Randy Owen, Consultant, CST Fleet Services

QUALIFICATIONS

Accredited Institutions

B.A. and M.A.

UCLA

Employment

CST Fleet Services

Matrix Consulting Group

EXPERIENCE

Randy Owen works with CST Fleet Services as a consultant and project manager. Randy has 25 years of experience as a fleet manager and fleet management consultant. Mr. Owen is a nationally recognized expert in fleet management best practices and has participated in more than 300 fleet management projects in his career. He has participated in dozens of projects that involved consolidating fleet programs and/or developing a shared services approach. As a fleet manager, he oversaw the consolidation of Charlotte's general fleet and fire fleet maintenance programs.

Experience as a Fleet Management Consultant

Examples of clients for whom Mr. Owen has served as the lead project analyst on fleet management studies include the following:

- Several private and public universities
- More than a dozen state government agencies
- Many of the largest cities and counties in the country
- Several federal government agencies
- Dozens of private companies including utilities

Randy has led projects focusing on all facets of fleet operations including development of fleet replacement plans, lease versus buy analysis, fleet rightsizing assessments, optimizing fleet maintenance programs, development of organizational redesigns and staffing analyses, green fleet projects, adoption of technology tools, and best practices assessments. He has served over 30 public sector clients in California including state agencies, most of the largest counties in the state, and dozens of cities.

Experience As A Government Fleet Manager

Mr. Owen has served as fleet manager for the following government jurisdictions:

- Electric Fleet Project Manager for Duke Energy (2020 to 2021)
- Director, Equipment Services Division, City of Charlotte (1997 to 2001)
- Chief, Fleet Management, Los Angeles County Public Works (1987 to 1997)