



Proposal to Provide Consulting Services To:

Rowan County



July 2021

## TRANSMITTAL LETTER

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July 9, 2021

**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 develop a request for proposals (RFP) for 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 have specific experience and expertise in writing RFPs for fleet services our clients. RFP projects include Charlotte, Mecklenburg County, Richmond VA, Detroit, New York City, Chicago, Houston, and private companies as well as other cities and counties.

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](mailto: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 free of any relationships with companies that we respond to a RFP resulting from this project.

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:

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

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.

Our firm and project team members have significant experience working on fleet service contacting projects including development of RFPs for Charlotte, Mecklenburg County, Los Angeles County, Richmond VA,

Detroit, New York City, Chicago, Houston, and private companies. We also have completed reviews of contract operations for numerous clients.

## **TECHNICAL PROPOSAL**

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### **PROJECT UNDERSTANDING**

We understand that Rowan County has a decentralized approach to fleet operations with each department maintaining its own fleet. While the county owns a vehicle repair shop, the facility is largely unused, and vehicles are primarily maintained by local vendors. The County does not have a maintenance management system to track assets and maintenance operations. Consequently, the County is interested in exploring the option of outsourcing fleet management to a company that specializes in these services.

There are several companies that specialize in providing governments with fleet management services including operation of on-site maintenance garages. These firms include First Vehicle Services, Centerra Group, Vector Fleet Management and several others. Contracts for these services normally are designed as “target” and “non-target”. Target services are all normal services required to maintain the fleet and are paid through an annual fixed price that includes overhead costs. Non-target services are non-routine activities such as repair of accident damage, vehicle misuse, storm damage, and modification of vehicles.

Below we describe our proposed scope of services for this project with Rowan County with a focus on development of a scope of work for a Request for Proposal (RFP), support during the procurement process, and assistance in evaluation of the proposals.

### **WORK PLAN**

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

#### **Task 1 –Project Initiation**

To begin the project, we will provide the County with a request for information including a vehicle inventory list, relevant policies, and budgets. We will also want to meet with County staff to understand current issues, maintenance requirements, and the County’s goals for project. This meeting should include staff from major fleet user departments, Purchasing, and any other stakeholders the County feels should attend the session. We will also tour the County’s shop noting the availability and condition of tools and equipment. After the meeting and gaining a thorough understanding of current fleet operations, we will begin developing the scope of services for the RFP as summarized in the task below.

#### **Task 2 - Develop Scope of Services**

In this task we will develop the scope of work section for inclusion in the RFP. Besides detailing the required services, we will also describe additional elements to be included in the RFP such as technical requirements and evaluation criteria. Following is a summary of the elements that will be included:

- **General Requirements**
  - Split of responsibilities between Rowan County and the selected contractor.

- Standards for the experience of contractor staff.
  - Requirements for a contractor provided fleet management system.
  - Management and security procedures for County provided equipment.
  - Maintenance and upkeep requirements for contractor-occupied work areas.
- **Service Requirements**
    - Details about the fleet including types, department assignments, age, and annual use.
    - List of services the contractor will be required to provide.
    - Detailed description of target and non-target services.
    - Standards of service and performance criteria such as availability of the fleet, service turnaround time, and compliance with preventive maintenance schedules.
    - Service quality and warranty coverage requirements, such as maximum rework rates of repeat repairs, service and parts warranties, and acceptable parts quality.
    - Details on requirements for documenting work and service records, management information, and reports.
    - Requirements for meetings and communication.
  - **Contract Management**
    - Contract management procedures.
    - Communication protocols.
    - Performance measurement.
    - Incentives and penalties.
  - **Proposal Evaluation**
    - Scoring matrix.
    - Initial review of proposals.
    - Development of a short list of vendors (if required).
    - Interviews with short-listed vendors.
    - Final recommendations.

We will develop each of these sections based on our knowledge of the fleet industry, our staff's experience with other organizations that have contracted for fleet services, interviews with County staff, and the County's existing policies and procedures.

We will provide a draft scope of work document to Rowan County in electronic format. We will include any changes required by County staff into the document based on feedback that we receive. We assume that this feedback be coordinated by the County and sent to us one time with all edits consolidated. The final scope of work can then be included in the County's standard RFP boilerplate for transmittal to vendors. We will provide a list of vendors based on our past work in the industry.

#### **Task 4 - Pre-bid Processes**

In this task we will attend the pre-bid conference scheduled by the County. During the conference we will respond to any questions directed to us to provide clarification on any portions of the RFP which we prepared. Following the pre-bid conference, we will prepare written responses to questions related to the statement of work section of the RFP that we prepared and forward them to the County for inclusion in an addendum.

#### **Task 5 - Evaluate Proposals**

In this task we will conduct an independent evaluation of proposals and identify the contractor we feel has submitted the best overall approach for Rowan County to consider. We will document our findings and recommendations in a brief report to the proposal evaluation team. Please note that our budget for this task assumes there will be no more than three proposals for us to evaluate. If more proposals are received by the County, we will require an additional budget of \$3,000 per additional proposal.

Our work in this area will include:

- Developing evaluation criteria and a scoring matrix.
- Reviewing proposals.
- Reviewing qualifications and experience.
- Checking references.
- Evaluating cost proposals.
- Ranking vendors.
- Providing a recommended approach.

#### **Task 6 (optional) – Provide transition support**

In this optional task we would assist the County transition to contract fleet services including:

- Negotiate a final contract with the selected vendor.
- Develop a transition plan and timeline.
- Establish procedures for contract monitoring and management.

#### **Task 7 (optional) – Provide contract monitoring services**

The County may also want to consider obtaining assistance in monitoring contractor performance including validating monthly invoices, spot checking work orders, approving high-cost repairs, etc. We are also available to conduct annual audits of the contractor including compliance with contract terms, customer service, record keeping, etc.

We would be happy to provide a quote for the services described in the optional tasks upon request.

## Project budget

Our proposed price for this engagement is as follows:

Classification	Billing Rate	Hours	Fees
Project Mgr	\$195	20	\$ 3,900
Senior Analyst	\$195	60	\$11,700
Analyst	\$125	24	\$ 3,000
Totals		104	\$18,600

## Project Schedule

Assuming we are awarded the project by July 15, 2021, we will complete the on-site visit no later than August 1, 2021, including production of a summary of County fleet operations. We will also produce a draft statement of work by September 1, 2021.

## Payment Schedule

Task	Payment
On-site visit and interviews completed	\$6,200.00
Draft RFP completed	\$6,200.00
Evaluation report completed	\$6,200.00
	\$18,600.00

## 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. Ms. Hall is in the process of becoming a Certified Automotive Fleet Specialist through the NAFA Fleet Management program.



## Attachment A

1. Please provide the total cost to complete the scope of services identified above including all travel and expenses. We are not seeking hourly rates, ranges or estimates. This must be the final absolute dollar amount to perform all services identified above.

COST: \$\_\_18,600.00

2. Does your company offer any fleet maintenance services, software, parts purchase, vehicle purchase or vehicle lease options?

Yes \_\_\_\_ No \_\_X\_\_

3. Is your company vendor neutral in relation to providing the services described in the Rowan County RFP "Writing an RFP for Fleet Management Services"?

Yes \_\_X\_\_ No \_\_\_\_

4. Does your company provide any solution to any matters involving our future endeavors regarding Fleet Management Services excluding consulting or contract review?

Yes \_\_\_\_ No \_\_X\_\_

5. Can your company begin work by August 1, 2021? This shall mean in person meeting with stakeholders on or before August 1, 2021?

Yes \_\_X\_\_ No \_\_\_\_

6. Can your company complete the RFP on or before September 1, 2021?

Yes \_\_X\_\_ No \_\_\_\_

COMPANY NAME: \_\_CST Fleet Services\_\_\_\_

PERSON FILLING OUT FORM: \_\_Ron Hall\_\_\_\_

SIGNATURE: \_\_\_\_

DATE: \_\_7/6/2021\_\_\_\_

## ATTACHMENT B – 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 joining 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. Ms. Hall is in the process of becoming a Certified Automotive Fleet Specialist through the NAFA Fleet Management program.