



AUTOMOTIVE PARTS AND RELATED PRODUCTS & SERVICES
ITB # 269-2016-070 Solicitation and Evaluation Summary

Background

On June 8, 2016, the City of Charlotte Procurement Management Division issued an Invitation to Bid (ITB) for interested suppliers to provide Automotive Parts for Light, Medium, Heavy Duty Vehicles, and Related Products & Services to satisfactorily support the City of Charlotte, and other public agencies supported under this contract. The City of Charlotte served as Lead Public Agency on behalf of the U.S. Communities Government Purchasing Alliance through a public agency clause, which provides that any county, city, special district, local government, school district, private K-12 school, technical or vocational school, higher education institution (including community colleges, colleges and universities, both public and private), state, other government agency or nonprofit organization may purchase Products and Services through this contract.

Solicitation Process

1. Invitation to Bid (ITB #269-2016-070) was issued in accordance with NC State Statutes (G.S. 143-129) on March 21, 2011.
2. We advertised the solicitation in the *Charlotte Observer* newspaper (affidavit attached), posted the solicitation on the NC Interactive Purchasing System (NCIPS) website at: www.ips.state.nc.us, and U.S. Communities website at: www.uscommunities.org. Although not required by law or policy, we also sent a courtesy email notification of the opportunity to bid to 132 vendors that are registered with the City under the NIGP commodity codes 99809 & 97514.
3. A Pre-bid conference was held on June 22, 2016 to review specifications and allow the suppliers to ask questions pertaining to the bid process or specifications. (Although law does not require a pre-bid, it is the City's practice to conduct pre-bids.)
4. We received three (3) sealed bids in response to the ITB that were stamped and stored unopened until July 13, 2016 from the following:
 - Advance Stores Company
 - Factory Motor Parts
 - S & C Global Products
5. The bid from S & C Global Products was deemed non-responsive based on the fact they only bid one item.
6. Copies of the two valid bids received from Advance Stores and Factory Motor Parts were sent on July 14, 2016 to the Evaluation Team ("Team") consisting of the following:

Voting Members:

- Warren Ellington, City of Charlotte - Fleet Management
- Gerald Lopex, City of Charlotte - Fleet Management
- Genetta Carothers, City of Charlotte - Procurement Management
- Bruce Erickson, City of Charlotte - Procurement Management
- Karen Ewing, City of Charlotte - Procurement Management
- John Christofferson, City of Austin, TX
- Ryan Harter, Denver Public Schools, CO
- Bill Thomas, Cobb County, GA

Non-Voting Members:

- Amelia Beonde, City of Charlotte - Procurement Management
- Adam Jones, City of Charlotte - Procurement Management Legal Advisor

- Mary Pelfrey, U.S. Communities
- Alexis Turner, U.S. Communities
- Tyler McCall, U.S. Communities

Please note that U.S. Communities members reviewed the bids for compliance with U.S. Communities requirements and did not score bids, and did not have a vote on the final recommendations.

Evaluation of Bids

1. All Team members conducted individual evaluations of each Bid received based on the criteria stated in Section 3.3 of the ITB, and in accordance with, and subject to, all relevant statutes, ordinances, rules and regulations that govern procurement in the state of North Carolina.

The Evaluation Team determined the lowest responsive, responsible Bidder whom's bid is most advantageous to the Lead Public Agency and potential Participating Public Agencies, based on the following criteria:

- A. Compliance with the terms and conditions of the ITB;
- B. Ability to meet the performance requirements of this ITB;
- C. Experience, Background, Qualifications, Capability, Marketing, (including past performances, administration, management capabilities);
- D. Products and services offerings (extent of offerings);
- E. Discount/rebate schedules;
- F. Pricing on Sample Item Lists (Attachment 1 and 2)
- G. Catalog pricing on complete offering;
- H. Cost effectiveness and Value;
- I. Financial Qualifications;
- J. Company Environmental Initiatives;
- K. References

2. The Evaluation Team submitted their individually completed evaluation matrix to Karen on or before August 5, 2016.
3. The City of Charlotte and U.S. Communities independently conducted a pricing analysis on Attachments 1 & 2 which included identifying any variances (i.e. unit of measures, part numbers, etc.) to ensure "apples to apples" comparison.
4. The Evaluation Team met in Charlotte, North Carolina on August 9 and 10, 2016.
5. The Team reviewed the bids submitted by Advance Stores Company and Factory Motor Parts and made a list of questions as we discussed each bid. The team members verbally provided their individual scores for each criteria, which Karen recorded on the combined scoring matrix (projected on the screen) and the total scores were averaged.
6. The Team held a 1:00 p.m. conference call with Laura Payne/ Advance Stores Company, and asked the list of prepared questions. Laura provided verbal clarifications, or acknowledged she would provide the information requested. Karen e-mailed Laura the list of questions and requested a written response.
7. The Team re-evaluated their individual scores for each vendor based on the information obtained during the conference calls. As a result, some scores were revised.
8. Karen provided the Team with the pricing analysis results completed on Attachments 1 & 2. The analysis only compared matched items ("apples to apples") and any unlike items were excluded from both vendors' pricing sheets for the comparison.
9. All additional information received from Advance Stores Company was forwarded to each Evaluation Team member for review and comments. John Christofferson revised his scores as a result of the clarifications to questions. No other team members made any revisions to their evaluation matrix.
10. The Evaluation Team unanimously agreed on recommending Advance Stores Company as the lowest responsive, responsible bidder, and as having the most comprehensive and advantageous bid and best

overall solution for the City of Charlotte and potential participating public agencies nationwide through U.S. Communities.

11. A recommendation was made to the Charlotte City Council for consideration at the regularly scheduled Council meeting on September 12, 2016 to award the contract as recommended.
12. City Council approved the contract with Advance Stores Company, Inc.
13. The effective date of the contracts and Master Agreements will be December 1, 2016 for the term of three (3) years with the option to renew for two (2) additional two-year terms.

ITB# 269-2016-070 – Bid Tabulation

Automotive Parts and Accessories for Light, Medium, Heavy Duty Vehicles and Related Services

Suppliers	Attachment 1 Charlotte Market Basket	Number of items bid for Attachment 1 (out of total 304)	Attachment 2 National Market Basket	Number of items bid for Attachment 2 (out of total 498)	Attachment 3 General Product Offering	Total
Advance Auto	\$ 152,991.18	304	\$ 7,875,731.35	498	559,069	\$ 8,028,722.53
Factory Motor Parts	\$ 175,120.27	275	\$ 9,105,806.41	417	69,323	\$ 9,280,926.68
S & C Global Products	NON-Responsive*					

Only bid truck claw accessory item *

Suppliers	Attachment 1 Charlotte Market Basket	Attachment 1 Minus "No Bid" or UOM/Product Discrepancies (Refer to Excel Pricing Analysis)	Attachment 2 National Market Basket	Attachment 2 Minus "No Bid" or UOM/Product Discrepancies (Refer to Excel Pricing Analysis)	Total
Advance Auto	\$ 152,991.18	\$135,827	\$ 7,875,731.35	\$7,061,744	\$7,197,571
Factory Motor Parts	\$ 175,120.27	\$154,941	\$ 9,105,806.41	\$7,508,537	\$7,663,478
Difference	\$22,129	\$19,114	\$1,230,075	\$446,793	\$465,907

North Carolina } ss
Mecklenburg County }

Charlotte Observer

REFERENCE: 205406 CITY OF CHARLOTTE PROCUR

0002499445 BIDS WANTED: Sealed bid responses will be received by the City of Charlotte, Procurement Management Division at the



Before the undersigned, a Notary Public of said County and State, duly authorized to administer oaths affirmations, etc., personally appeared, being duly sworn or affirmed according to law, doth depose and say that he/she is a representative of The Charlotte Observer Publishing Company, a corporation organized and doing business under the laws of the State of Delaware, and publishing a newspaper known as The Charlotte Observer in the city of Charlotte, County of Mecklenburg, and State of North Carolina and that as such he/she is familiar with the books, records, files, and business of said Corporation and by reference to the files of said publication, the attached advertisement was inserted. The following is correctly copied from the books and files of the aforesaid Corporation and Publication.

PUBLISHED ON: 06/10/2016

AD SPACE: 21 LINES

FILED ON: 06/15/2016



NAME: Judith M. Deans

TITLE: County Clerk

DATE: JUN 16 2016

In Testimony Whereof I have hereunto set my hand and affixed my seal, the day and year aforesaid.

Notary: Sergio M. Medina

My commission Expires: / /

My Commission Expires May 27, 2021



Agenda Date: 9/12/2016

Agenda #: 54. **File #:** 15-3796 **Type:** Consent Item

Automotive Parts and Accessories

Action:

- A. Award a unit price contract to the lowest responsive bidder Advance Stores Company, Inc. for the purchase of Automotive Parts and Accessories for the term of three years, and**

- B. Authorize the City Manager to renew the contract for up to two additional, two-year renewal terms with possible price adjustments and to amend the contract consistent with the City's business needs and the purpose for which the contract was approved.**

Staff Resource(s):

Robert Campbell, Management & Financial Services
Chris Trull, Management & Financial Services

Explanation

- U. S. Communities Government Purchasing Alliance selected Management & Financial Services/ Finance-Procurement Management as Lead Public Agency to solicit bids for Automotive Parts and Accessories.
- The City and thousands of other public agencies will have access to the resulting master agreement to provide a complete line of Automotive Parts and Accessories for Light, Medium, and Heavy Duty Vehicles on a national level.
- The City's primary user of this contract will be Fleet Management, in support of citywide operational fleet needs.
- Management & Financial Services issued an Invitation to Bid (ITB #269-2016-070) on behalf of U.S. Communities on June 8, 2016.
- Two responsive and one non-responsive bids were received in response to the ITB.
- The bids were evaluated by a local and national team comprised of staff from Procurement Management, Fleet Management and representatives from the City of Austin, Texas, Cobb County, Georgia, and Denver, Colorado.
- Price was only one criterion. Other factors included extensiveness of product lines, warranties, background and experience, performance record, and the company's ability to supply and distribute products to public agencies in all 50 states.
- The company will be paid the unit prices set forth in the contract, a copy of which is available upon request.
- The City of Charlotte will receive an administrative fee from U.S. Communities for serving as the Lead Agency that includes responsibility for the solicitation process, contract management, contract amendments and renewals, quarterly vendor performance reviews, and consulting and/or