



**MASTER AGREEMENT #112025**  
**CATEGORY: Fleet Leasing and Vehicle Management Services**  
**SUPPLIER: Enterprise Fleet Management, Inc.**

This Master Agreement (Agreement) is between Sourcewell, a Minnesota service cooperative located at 202 12th Street Northeast, P.O. Box 219, Staples, MN 56479 (Sourcewell) and Enterprise Fleet Management, Inc., 2281 Ball Drive, Maryland Heights, MO 63146-8603 (Supplier).

Sourcewell is a local government and service cooperative created under the laws of the State of Minnesota (Minnesota Statutes Section 123A.21) offering a Cooperative Purchasing Program to eligible participating government entities.

Under this Master Agreement entered with Sourcewell, Supplier will provide Included Solutions to Participating Entities through Sourcewell's Cooperative Purchasing Program.

**Article 1:**  
**General Terms**

The General Terms in this Article 1 control the operation of this Master Agreement between Sourcewell and Supplier and apply to all transactions entered by Supplier and Participating Entities. Subsequent Articles to this Master Agreement control the rights and obligations directly between Sourcewell and Supplier (Article 2), and between Supplier and Participating Entity (Article 3), respectively. These Article 1 General Terms control over any conflicting terms. Where this Master Agreement is silent on any subject, Participating Entity and Supplier retain the ability to negotiate mutually acceptable terms.

- 1) **Purpose.** Pursuant to Minnesota law, the Sourcewell Board of Directors has authorized a Cooperative Purchasing Program designed to provide Participating Entities with access to competitively awarded cooperative purchasing agreements. To facilitate the Program, Sourcewell has awarded Supplier this cooperative purchasing Master Agreement following a competitive procurement process intended to meet compliance standards in accordance with Minnesota law and the requirements contained herein.
- 2) **Intent.** The intent of this Master Agreement is to define the roles of Sourcewell, Supplier, and Participating Entity as it relates to Sourcewell's Cooperative Purchasing Program.
- 3) **Participating Entity Access.** Sourcewell's Cooperative Purchasing Program Master Agreements are available to eligible public agencies (Participating Entities). A Participating Entity's authority to access Sourcewell's Cooperative Purchasing Program is determined through the laws of its respective jurisdiction.
- 4) **Supplier Access.** The Included Solutions offered under this Agreement may be made available to any Participating Entity. Supplier understands that a Participating Entity's use of this Agreement is at the Participating Entity's sole convenience. Supplier will educate its sales and service forces about

Sourcewell eligibility requirements and required documentation. Supplier will be responsible for ensuring sales are with Participating Entities.

- 5) **Term.** This Agreement is effective upon the date of the final signature below. The term of this Agreement is four (4) years from the effective date. The Agreement expires at 11:59 P.M. Central Time on May 4, 2030, unless it is cancelled or extended as defined in this Agreement.
  1. **Extensions.** Sourcewell and Supplier may agree to up to three (3) additional one-year extensions beyond the original four-year term. The total possible length of this Agreement will be seven (7) years from the effective date.
  2. **Exceptional Circumstances.** Sourcewell retains the right to consider additional extensions as required under exceptional circumstances.
- 6) **Survival of Terms.** Notwithstanding the termination of this Agreement, the obligations of this Agreement will continue through the performance period of any transaction entered between Supplier and any Participating Entity before the termination date.
- 7) **Scope.** Supplier is awarded a Master Agreement to provide the solutions identified in RFP #112025 to Participating Entities. In Scope solutions include:
  1. Sourcewell is seeking proposals for Fleet Leasing and Vehicle Management Services, including, but not limited to:
    - a. Services for the acquisition by Sourcewell participating entities, whether by lease or financing, of on-road vehicles of all types or classifications, all weight classes, and all engine types;
    - b. New vehicle service and preparation for the vehicles described in subsection 1. a. above, such as, pre-delivery inspection, parts and accessories installation, and vehicle marking application or installation;
    - c. Preventative maintenance plans, vehicle maintenance and repair services, and related service level agreements for Sourcewell participating entity on-road vehicle fleets of all types; and,
    - d. In addition to the solutions described in subsections 1. a. - c. above, proposers may include a **complementary** offering of the following ancillary services:
      - i. Short-term on-road vehicles rental programs;
      - ii. Upfitting or aftermarket products;
      - iii. Fleet management information technologies, such as: telematics, fleet monitoring, fuel management, fuel tank management, and motor pool/fleet sharing software systems;
      - iv. Roadside assistance including towing, emergency charging, and repairs; and
      - v. Vehicle battery longevity monitoring, replacement plans; including installation, operation, and maintenance of dedicated charging and fueling stations.
- 8) **Included Solutions.** Supplier's Proposal to the above referenced RFP is incorporated into this Master Agreement. Only those Solutions included within Supplier's Proposal and within Scope (Included Solutions) are included within the Agreement and may be offered to Participating Entities.
- 9) **Indefinite Quantity.** This Master Agreement defines an indefinite quantity of sales to eligible Participating Entities.

- 10) **Pricing.** Pricing information (including Pricing and Delivery and Pricing Offered tables) for all Included Solutions within Supplier's Proposal is incorporated into this Master Agreement.
- 11) **Not to Exceed Pricing.** Suppliers may not exceed the prices listed in the current Pricing List on file with Sourcwell when offering Included Solutions to Participating Entities. Participating Entities may request adjustments to pricing directly from Supplier during the negotiation and execution of any transaction.
- 12) **Open Market.** Supplier's open market pricing process is included within its Proposal.
- 13) Supplier Representations:**
- a. **Compliance.** Supplier represents and warrants it will provide all Included Solutions under this Agreement in full compliance with applicable federal, state, and local laws and regulations.
  - b. **Licenses.** As applicable, Supplier will maintain a valid status on all required federal, state, and local licenses, bonds, and permits required for the operation of Supplier's business with Participating Entities. Participating Entities may request all relevant documentation directly from Supplier.
  - c. **Supplier Warrants.** Supplier warrants that all services performed by Supplier or on Supplier's behalf will be performed in a professional, timely, and workmanlike manner, in accordance with this Agreement, applicable law, and generally accepted industry standards. Supplier shall pass through to Participating Entities the full benefit of all applicable manufacturer, dealer, installer, upfitter, repair, parts, service, and other third-party warranties, at no additional cost, to the fullest extent permitted by law. Supplier agrees to assist a Participating Entity in reach a resolution in any dispute over warranty terms with the manufacturer or provider. Supplier shall correct, at no additional cost, any nonconforming service, billing error, administrative error, or warranty-processing error caused by Supplier or parties acting on Supplier's behalf.
- 14) **Bankruptcy Notices.** Supplier certifies and warrants it is not currently in a bankruptcy proceeding. Supplier has disclosed all current and completed bankruptcy proceedings within the past seven years within its Proposal. Supplier must provide notice in writing to Sourcwell if it enters a bankruptcy proceeding at any time during the term of this Agreement.
- 15) **Debarment and Suspension.** Supplier certifies and warrants that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from programs operated by the State of Minnesota, the United States federal government, or any Participating Entity. Supplier certifies and warrants that neither it nor its principals have been convicted of a criminal offense related to the subject matter of this Agreement. Supplier further warrants that it will provide immediate written notice to Sourcwell if this certification changes at any time during the term of this Agreement.
- 16) **Provisions for non-United States federal entity procurements under United States federal awards or other awards (Appendix II to 2 C.F.R § 200).** Participating Entities that use United States federal

grant or other federal funding to purchase solutions from this Agreement may be subject to additional requirements including the procurement standards of the Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards, 2 C.F.R. § 200. Participating Entities may have additional requirements based on specific funding source terms or conditions. Within this Section, all references to “federal” should be interpreted to mean the United States federal government. The following list applies when a Participating Entity accesses Supplier’s Included Solutions with United States federal funds.

- a. **EQUAL EMPLOYMENT OPPORTUNITY.** Except as otherwise provided under 41 C.F.R. § 60, all agreements that meet the definition of “federally assisted construction contract” in 41 C.F.R. § 60-1.3 must include the equal opportunity clause provided under 41 C.F.R. § 60-1.4(b), in accordance with Executive Order 11246, “Equal Employment Opportunity” (30 FR 12319, 12935, 3 C.F.R. §, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, “Amending Executive Order 11246 Relating to Equal Employment Opportunity,” and implementing regulations at 41 C.F.R. § 60, “Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor.” The equal opportunity clause is incorporated herein by reference.
- b. **DAVIS-BACON ACT, AS AMENDED (40 U.S.C. § 3141-3148).** Intentionally omitted.
- c. **CONTRACT WORK HOURS AND SAFETY STANDARDS ACT (40 U.S.C. § 3701-3708).** Intentionally omitted
- d. **RIGHTS TO INVENTIONS MADE UNDER A CONTRACT OR AGREEMENT.** Intentionally omitted
- e. **CLEAN AIR ACT (42 U.S.C. § 7401-7671Q.) AND THE FEDERAL WATER POLLUTION CONTROL ACT (33 U.S.C. § 1251-1387).** Intentionally omitted
- f. **DEBARMENT AND SUSPENSION (EXECUTIVE ORDERS 12549 AND 12689).** A contract award (see 2 C.F.R. § 180.220) must not be made to parties listed on the government wide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 C.F.R. § 180 that implement Executive Orders 12549 (3 C.F.R. § 1986 Comp., p. 189) and 12689 (3 C.F.R. § 1989 Comp., p. 235), “Debarment and Suspension.” SAM Exclusions contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549. Supplier certifies that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation by any federal department or agency.
- g. **BYRD ANTI-LOBBYING AMENDMENT, AS AMENDED (31 U.S.C. § 1352).** Suppliers must file any required certifications. Suppliers must not have used federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any federal contract, grant, or any other award covered by 31 U.S.C. § 1352. Suppliers must disclose any lobbying with non-federal funds that takes place in connection with obtaining any federal award. Such disclosures are forwarded from tier to tier up to the non-federal award. Suppliers must file all certifications

and disclosures required by, and otherwise comply with, the Byrd Anti-Lobbying Amendment (31 U.S.C. § 1352).

- h. **RECORD RETENTION REQUIREMENTS.** To the extent applicable, Supplier must comply with the record retention requirements detailed in 2 C.F.R. § 200.333. The Supplier further certifies that it will retain all records as required by 2 C.F.R. § 200.333 for a period of 3 years after grantees or subgrantees submit final expenditure reports or quarterly or annual financial reports, as applicable, and all other pending matters are closed.
- i. **ENERGY POLICY AND CONSERVATION ACT COMPLIANCE.** Intentionally omitted
- j. **BUY AMERICAN PROVISIONS COMPLIANCE.** Intentionally omitted
- k. **ACCESS TO RECORDS (2 C.F.R. § 200.336).** Supplier agrees that duly authorized representatives of a federal agency must have access to any books, documents, papers and records of Supplier that are directly pertinent to Supplier's discharge of its obligations under this Agreement for the purpose of making audits, examinations, excerpts, and transcriptions. The right also includes timely and reasonable access to Supplier's personnel for the purpose of interview and discussion relating to such documents.
- l. **PROCUREMENT OF RECOVERED MATERIALS (2 C.F.R. § 200.322).** Intentionally omitted
- m. **FEDERAL SEAL(S), LOGOS, AND FLAGS.** The Supplier cannot use the seal(s), logos, crests, or reproductions of flags or likenesses of Federal agency officials without specific pre-approval.
- n. **NO OBLIGATION BY FEDERAL GOVERNMENT.** The U.S. federal government is not a party to this Agreement or any purchase by a Participating Entity and is not subject to any obligations or liabilities to the Participating Entity, Supplier, or any other party pertaining to any matter resulting from the Agreement or any purchase by an authorized user.
- o. **PROGRAM FRAUD AND FALSE OR FRAUDULENT STATEMENTS OR RELATED ACTS.** The Contractor acknowledges that 31 U.S.C. § 38 (Administrative Remedies for False Claims and Statements) applies to the Supplier's actions pertaining to this Agreement or any purchase by a Participating Entity.
- p. **FEDERAL DEBT.** The Supplier certifies that it is non-delinquent in its repayment of any federal debt. Examples of relevant debt include delinquent payroll and other taxes, audit disallowance, and benefit overpayments.
- q. **CONFLICTS OF INTEREST.** The Supplier must notify the U.S. Office of General Services, Sourcewell, and Participating Entity as soon as possible if this Agreement or any aspect related to the anticipated work under this Agreement raises an actual or potential conflict of interest (as described in 2 C.F.R. Part 200). The Supplier must explain the actual or potential conflict in writing in sufficient detail so that the U.S. Office of General Services, Sourcewell, and Participating Entity are able to assess the actual or potential conflict; and provide any additional information as necessary or requested.

- r. **U.S. EXECUTIVE ORDER 13224.** The Supplier, and its subcontractors, must comply with U.S. Executive Order 13224 and U.S. Laws that prohibit transactions with and provision of resources and support to individuals and organizations associated with terrorism.
- s. **PROHIBITION ON CERTAIN TELECOMMUNICATIONS AND VIDEO SURVEILLANCE SERVICES OR EQUIPMENT.** Intentionally omitted
- t. **DOMESTIC PREFERENCES FOR PROCUREMENTS.** To the extent applicable, Supplier certifies that during the term of this Agreement, Supplier will comply with applicable requirements of 2 C.F.R. § 200.322.

## **Article 2: Sourcewell and Supplier Obligations**

The Terms in this Article 2 relate specifically to Sourcewell and its administration of this Master Agreement with Supplier and Supplier's obligations thereunder.

- 1) **Authorized Sellers.** Supplier must provide Sourcewell a current means to validate or authenticate Supplier's authorized dealers, distributors, or resellers which may complete transactions of Included Solutions offered under this Agreement. Sourcewell may request updated information in its discretion, and Supplier agrees to provide requested information within a reasonable time.
- 2) **Product and Price Changes Requirements.** Supplier may request Included Solutions changes, additions, or deletions at any time. All requests must be made in writing by submitting a Sourcewell Price and Product Change Request Form to Sourcewell. At a minimum, the request must:
  - Identify the applicable Sourcewell Agreement number;
  - Clearly specify the requested change;
  - Provide sufficient detail to justify the requested change;
  - Individually list all Included Solutions affected by the requested change, along with the requested change (e.g., addition, deletion, price change); and
  - Include a complete restatement of Pricing List with the effective date of the modified pricing, or product addition or deletion. The new pricing restatement must include all Included Solutions offered, even for those items where pricing remains unchanged.

A fully executed Sourcewell Price and Product Change Request Form will become an amendment to this Agreement and will be incorporated by reference.

- 3) **Authorized Representative.** Supplier will assign an Authorized Representative to Sourcewell for this Agreement and must provide prompt notice to Sourcewell if that person is changed. The Authorized Representative will be responsible for:
  - Maintenance and management of this Agreement;
  - Timely response to all Sourcewell and Participating Entity inquiries; and
  - Participation in reviews with Sourcewell.

Sourcewell's Authorized Representative is its Chief Procurement Officer.

- 4) **Performance Reviews.** Supplier will perform a minimum of one review with Sourcewell per agreement year. The review will cover transactions to Participating Entities, pricing and terms, administrative fees, sales data reports, performance issues, supply chain issues, customer issues, and any other necessary information.
- 5) **Sales Reporting Required.** Supplier is required as a material element to this Master Agreement to report all completed transactions with Participating Entities utilizing this Agreement. Failure to provide complete and accurate reports as defined herein will be a material breach of the Agreement and Sourcewell reserves the right to pursue all remedies available at law including cancellation of this Agreement.
- 6) **Reporting Requirements.** Supplier must provide Sourcewell an activity report of all transactions completed utilizing this Agreement. Reports are due at least once each calendar quarter (Reporting Period). Reports must be received no later than 45 calendar days after the end of each calendar quarter. Supplier may report on a more frequent basis in its discretion. Reports must be provided regardless of the amount of completed transactions during that quarter (i.e., if there are no sales, Supplier must submit a report indicating no sales were made). Enterprise will provide required reporting within 30 days after our fiscal quarter ends.

The Report must contain the following fields:

- Participating Entity Name (e.g., City of Staples Highway Department);
- Participating Entity Physical Street Address;
- Participating Entity City;
- Participating Entity State/Province;
- Participating Entity Zip/Postal Code;
- Sourcewell Participating Entity Account Number;
- Transaction Description;
- Transaction Purchased Price;
- Sourcewell Administrative Fee Applied; and
- Date Transaction was invoiced/sale was recognized as revenue by Supplier.

If collected by Supplier, the Report may include the following fields as available:

- Participating Entity Contact Name;
- Participating Entity Contact Email Address;
- Participating Entity Contact Telephone Number;

- 7) **Administrative Fee.** In consideration for the support and services provided by Sourcewell, Supplier will pay an Administrative Fee to Sourcewell on all completed transactions to Participating Entities utilizing this Agreement. Supplier will include its Administrative Fee within its proposed pricing. Supplier may not directly charge Participating Entities to offset the Administrative Fee.
- 8) Enterprise Fleet Management retains the right to offer discounted promotional pricing on a market by market basis.
- 9) **Fee Calculation.** Supplier's Administrative Fee payable to Sourcewell will be calculated as a stated percentage (listed in Supplier's Proposal) of all completed transactions utilizing this Master

Agreement within the preceding Reporting Period. For certain categories, a flat fee may be proposed. The Administrative Fee will be stated in Supplier's Proposal.

- 10) **Fee Remittance.** Supplier will remit fee to Sourcewell no later than 45 calendar days after the close of the preceding calendar quarter in conjunction with Supplier's Reporting Period obligations defined herein. Payments should note the Supplier's name and Sourcewell-assigned Agreement number in the memo; and must be either mailed to Sourcewell above "Attn: Accounts Receivable" or remitted electronically to Sourcewell's banking institution per Sourcewell's Finance department instructions.
- 11) **Noncompliance.** Sourcewell reserves the right to seek all remedies available at law for unpaid or underpaid Administrative Fees due under this Agreement. Failure to remit payment, delinquent payments, underpayments, or other deviations from the requirements of this Agreement may be deemed a material breach and may result in cancellation of this Agreement and disbarment from future Agreements.
- 12) **Audit Requirements.** Pursuant to Minn. Stat. § 16C.05, subdivision 5, the books, records, documents, and accounting procedures and practices relevant to this Agreement are subject to examination by Sourcewell and the Minnesota State Auditor for a minimum of six years from the end of this Agreement. Supplier agrees to fully cooperate with Sourcewell in auditing transactions under this Agreement to ensure compliance with pricing terms, correct calculation and remittance of Administrative Fees, and verification of transactions as may be requested by a Participating Entity or Sourcewell.
- 13) **Assignment, Transfer, and Administrative Changes.** Supplier may not assign or otherwise transfer its rights or obligations under this Agreement without the prior written consent of Sourcewell. Such consent will not be unreasonably withheld. Sourcewell reserves the right to unilaterally assign all or portions of this Agreement within its sole discretion to address corporate restructurings, mergers, acquisitions, or other changes to the Responsible Party and named in the Agreement. Any prohibited assignment is invalid. Upon request Sourcewell may make administrative changes to agreement documentation such as name changes, address changes, and other non-material updates as determined within its sole discretion.
- 14) **Amendments.** Any material change to this Agreement must be executed in writing through an amendment and will not be effective until it has been duly executed by the parties.
- 15) **Waiver.** Failure by Sourcewell to enforce any right under this Agreement will not be deemed a waiver of such right in the event of the continuation or repetition of the circumstances giving rise to such right.
- 16) **Complete Agreement.** This Agreement represents the complete agreement between the parties for the scope as defined herein. Supplier and Sourcewell may enter into separate written agreements relating specifically to transactions outside of the scope of this Agreement.
- 17) **Relationship of Sourcewell and Supplier.** This Agreement does not create a partnership, joint venture, or any other relationship such as employee, independent contractor, master-servant, or principal-agent.

- 18) **Indemnification.** Supplier must indemnify, defend, save, and hold Sourcewell, including their agents and employees, harmless from any third-party claims or causes of action, including attorneys' fees incurred by Sourcewell, arising out of any act or omission in the performance of this Contract by the Supplier or its agents or employees. Sourcewell's responsibility will be governed by the State of Minnesota's Tort Liability Act (Minnesota Statutes Chapter 466) and other applicable law.
- 19) **Data Practices.** Supplier and Sourcewell acknowledge Sourcewell is subject to the Minnesota Government Data Practices Act, Minnesota Statutes Chapter 13. As it applies to all data created and maintained in performance of this Agreement, Supplier may be subject to the requirements of this chapter.
- 20) **Grant of License.**
- a) **During the term of this Agreement:**
    - i) **Supplier Promotion.** Sourcewell grants to Supplier a royalty-free, worldwide, non-exclusive right and license to use the trademark(s) provided to Supplier by Sourcewell in advertising, promotional materials, and informational sites for the purpose of marketing Sourcewell's Agreement with Supplier.
    - ii) **Sourcewell Promotion.** Supplier grants to Sourcewell a royalty-free, worldwide, non-exclusive right and license to use Supplier's trademarks in advertising, promotional materials, and informational sites for the purpose of marketing Supplier's Agreement with Sourcewell.
  - b) **Limited Right of Sublicense.** The right and license granted herein includes a limited right of each party to grant sublicenses to their respective subsidiaries, distributors, dealers, resellers, marketing representatives, partners, or agents (collectively "Permitted Sublicensees") in advertising, promotional, or informational materials for the purpose of marketing the Parties' relationship. Any sublicense granted will be subject to the terms and conditions of this Article. Each party will be responsible for any breach of this section by any of their respective sublicensees.
  - c) **Use; Quality Control.**
    - i) Neither party may alter the other party's trademarks from the form provided and must comply with removal requests as to specific uses of its trademarks or logos.
    - ii) Each party agrees to use, and to cause its Permitted Sublicensees to use, the other party's trademarks only in good faith and in a dignified manner consistent with such party's use of the trademarks. Each party may make written notice to the other regarding misuse under this section. The offending party will have 30 days of the date of the written notice to cure the issue or the license/sublicense will be terminated.
  - d) **Termination.** Upon the termination of this Agreement for any reason, each party, including Permitted Sublicensees, will have 30 days to remove all Trademarks from signage, websites, and the like bearing the other party's name or logo (excepting Sourcewell's pre-printed catalog of suppliers which may be used until the next printing). Supplier must return all marketing and promotional materials, including signage, provided by Sourcewell, or dispose of it according to Sourcewell's written directions.

- 21) **Venue and Governing law between Sourcewell and Supplier Only.** The substantive and procedural laws of the State of Minnesota will govern this Agreement between Sourcewell and Supplier. Venue for all legal proceedings arising out of this Agreement between Sourcewell and Supplier will be in court of competent jurisdiction within the State of Minnesota. This section does not apply to any dispute between Supplier and Participating Entity. This Agreement reserves the right for Supplier and Participating Entity to negotiate this term to within any transaction documents.
- 22) **Severability.** If any provision of this Agreement is found by a court of competent jurisdiction to be illegal, unenforceable, or void then both parties will be relieved from all obligations arising from that provision. If the remainder of this Agreement is capable of being performed, it will not be affected by such determination or finding and must be fully performed.
- 23) **Insurance Coverage.** At its own expense, Supplier must maintain valid insurance policy(ies) during the performance of this Agreement with insurance company(ies) licensed or authorized to do business in the State of Minnesota having an "AM BEST" rating of A- or better, with coverage and limits of insurance not less than the following:
- a) **Commercial General Liability Insurance.** Supplier will maintain insurance covering its operations, with coverage on an occurrence basis, and must be subject to terms no less broad than the Insurance Services Office ("ISO") Commercial General Liability Form CG0001 (2001 or newer edition), or equivalent. At a minimum, coverage must include liability arising from premises, operations, bodily injury and property damage, independent contractors, products-completed operations including construction defect, contractual liability, blanket contractual liability, and personal injury and advertising injury. All required limits, terms and conditions of coverage must be maintained during the term of this Agreement.
    - \$1,500,000 each occurrence Bodily Injury and Property Damage
    - \$1,500,000 Personal and Advertising Injury
    - \$2,000,000 aggregate for products liability-completed operations
    - \$2,000,000 general aggregate
  - b) **Certificates of Insurance.** Prior to execution of this Agreement, Supplier must furnish to Sourcewell a certificate of insurance, as evidence of the insurance required under this Agreement. Prior to expiration of the policy(ies), renewal certificates must be mailed to Sourcewell, 202 12th Street Northeast, P.O. Box 219, Staples, MN 56479 or provided to in an alternative manner as directed by Sourcewell. The certificates must be signed by a person authorized by the insurer(s) to bind coverage on their behalf. Failure of Supplier to maintain the required insurance and documentation may constitute a material breach.
  - c) **Additional Insured Endorsement and Primary and Non-contributory Insurance Clause.** Supplier agrees to list Sourcewell, including its officers, agents, and employees, as an additional insured under the Supplier's commercial general liability insurance policy with respect to liability arising out of activities, "operations," or "work" performed by or on behalf of Supplier, and products and completed operations of Supplier. The policy provision(s) or endorsement(s) must further provide that coverage is primary and not excess over or contributory with any other valid, applicable, and collectible insurance or self-insurance in force for the additional insureds.
  - d) **Waiver of Subrogation.** Supplier waives and must require (by endorsement or otherwise) all its insurers to waive subrogation rights against Sourcewell and other additional insureds for losses

paid under the insurance policies required by this Agreement or other insurance applicable to the Supplier or its subcontractors. The waiver must apply to all deductibles and/or self-insured retentions applicable to the required or any other insurance maintained by the Supplier or its subcontractors. Where permitted by law, Supplier must require similar written express waivers of subrogation and insurance clauses from each of its subcontractors.

- e) **Umbrella/Excess Liability/SELF-INSURED RETENTION.** The limits required by this Agreement can be met by either providing a primary policy or in combination with umbrella/excess liability policy(ies), or self-insured retention.

- 24) **Termination for Convenience.** Sourcewell or Supplier may terminate this Agreement upon 60 calendar days' written notice to the other Party. Termination pursuant to this section will not relieve the Supplier's obligations under this Agreement for any transactions entered with Participating Entities through the date of termination, including reporting and payment of applicable Administrative Fees.
- 25) **Termination for Cause.** Sourcewell may terminate this Agreement upon providing written notice of material breach to Supplier. Notice must describe the breach in reasonable detail and state the intent to terminate the Agreement. Upon receipt of Notice, the Supplier will have 30 calendar days in which it must cure the breach. Termination pursuant to this section will not relieve the Supplier's obligations under this Agreement for any transactions entered with Participating Entities through the date of termination, including reporting and payment of applicable Administrative Fees.

### **Article 3: Supplier Obligations to Participating Entities**

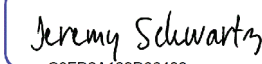
The Terms in this Article 3 relate specifically to Supplier and a Participating Entity when entering transactions utilizing the General Terms established in this Master Agreement. Article 1 General Terms control over any conflict with this Article 3. Where this Master Agreement is silent on any subject, Participating Entity and Supplier retain the ability to negotiate mutually acceptable terms.

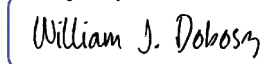
- 1) **Quotes to Participating Entities.** Suppliers are encouraged to provide all pricing information regarding the total cost of acquisition when quoting to a Participating Entity. Suppliers and Participating Entities are encouraged to include all cost specifically associated with or included within the Suppliers proposal and Included Solutions within transaction documents.
- 2) **Shipping, Delivery, Acceptance, Rejection, and Warranty.** Supplier's proposal may include proposed terms relating to shipping, delivery, inspection, and acceptance/rejection and other relevant terms of tendered Solutions. Supplier and Participating Entity may negotiate final terms appropriate for the specific transaction relating to non-appropriation, shipping, delivery, inspection, acceptance/rejection of tendered Solutions, and warranty coverage for Included Solutions. Such terms may include, but are not limited to, costs, risk of loss, proper packaging, inspection rights and timelines, acceptance or rejection procedures, and remedies as mutually agreed include notice requirements, replacement, return or exchange procedures, and associated costs.
- 3) **Applicable Taxes.** Participating Entity is responsible for notifying supplier of its tax-exempt status and for providing Supplier with any valid tax-exemption certification(s) or related documentation.

- 4) **Ordering Process and Payment.** Supplier's ordering process and acceptable forms of payment are included within its Proposal. Participating Entities will be solely responsible for payment to Supplier and Sourcewell will have no liability for any unpaid invoice of any Participating Entity.
- 5) **Transaction Documents.** Supplier will require the use of its own forms to complete transactions directly with Participating Entity utilizing the terms established in this Agreement. Supplier's standard form agreements will be offered as part of its Proposal. Supplier and Participating Entity may complete and document transactions utilizing any type of transaction documents as mutually agreed. In any transaction document entered utilizing this Agreement, Supplier and Participating Entity must include specific reference to this Master Agreement by number and to Participating Entity's unique Sourcewell account number.
- 6) **Additional Terms and Conditions Permitted.** Participating Entity and Supplier may negotiate and include additional terms and conditions within transaction documentation as mutually agreed. Such terms may supplant or supersede this Master Agreement when necessary and as determined by Supplier and Participating Entity. Sourcewell has expressly reserved the right for Supplier and Participating Entity to address any necessary provisions within transaction documents not expressly included within this Master Agreement, including but not limited to transaction cancellation, dispute resolution, governing law and venue, non-appropriation, insurance, defense and indemnity, and other material terms as mutually agreed. It is Enterprise Fleet Management Inc.'s intention to work with each Participating Entity to arrive at a mutually beneficial solution regarding contract negotiations of Participating Entity's Terms and Conditions. Enterprise Fleet Management utilizes Enterprise FM Trust as the Lessor in the Asset-backed securitization (ABS) market, which is the best market for a leasing business to obtain its debt. Without a Trust as the Lessor, it would not be possible to enter this debt market. Additionally certain terms and conditions that obligate the Trust may prohibit entering this debt market. Due to this, we would like to negotiate certain terms of the Participating Entity Standard Contract Terms and Conditions. Additionally, not including this Master Agreement, Supplier's Master **[\*\*Equity/Walkaway\*\*]** Lease Agreement must supersede all other agreements with a Participating Entity. All pricing is subject to successful contract negotiations and dependent on credit worthiness.
- 7) **Subsequent Agreements and Survival.** Supplier and Participating Entity may enter into a separate agreement to facilitate long-term performance obligations utilizing the terms of this Master Agreement as mutually agreed. Such agreements may provide for a performance period extending beyond the full term of this Master Agreement as determined in the discretion of Participating Entity.
- 8) **Participating Addendums.** Supplier and Participating Entity may enter a Participating Addendum or similar document extending and supplementing the terms of this Master Agreement to facilitate adoption as may be required by a Supplier and Participating Entity.

Sourcewell

Enterprise Fleet Management, Inc.

Signed by:  
  
C0FD2A139D06489...  
By: \_\_\_\_\_  
Jeremy Schwartz  
Title: Chief Procurement Officer  
Date: 5/29/2026 | 6:51 AM CDT

Signed by:  
  
D402067331DF4B9...  
By: \_\_\_\_\_  
Billy Dobosz  
Title: Assistant Vice President  
Date: 5/28/2026 | 12:55 PM PDT

# RFP 112025 - Fleet Leasing and Vehicle Management Services

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## Vendor Details

Company Name: Enterprise Fleet Management, Inc.  
Does your company conduct business under any other name? If yes, please state: MO  
Address: 600 Corporate Park Dr.  
St. Louis, MO 63050  
Contact: Michelle Rojas  
Email: michelle.m.rojas@efleets.com  
Phone: 314-686-9925  
HST#: 43-1697807

## Submission Details

Created On: Tuesday October 07, 2025 14:28:50  
Submitted On: Thursday November 20, 2025 12:05:44  
Submitted By: Michelle Rojas  
Email: michelle.m.rojas@efleets.com  
Transaction #: 7c809a8c-025c-4219-9b26-99574ef9bd81  
Submitter's IP Address: 147.243.206.211

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**Specifications**

**Table 1: Proposer Identity & Authorized Representatives (Not Scored)**

**General Instructions** (applies to all Tables) Sourcewell prefers a brief but thorough response to each question. Do not merely attach additional documents to your response without also providing a substantive response. Do not leave answers blank; respond “N/A” if the question does not apply to you (preferably with an explanation).

Table 1 Specific Instructions. Sourcewell requires identification of all parties responsible for providing Solutions under a resulting master agreement(s) (Responsible Supplier). Proposers are strongly encouraged to include all potential Responsible Suppliers including any corporate affiliates, subsidiaries, D.B.A., and any other authorized entities within a singular proposal. All information required under this RFP must be included for each Responsible Supplier as instructed. Proposers with multiple Responsible Supplier options may choose to respond individually as distinct entities, however each response will be evaluated individually and only those proposals recommended for award may result in a master agreement award. Unawarded entities will not be permitted to later be added to an existing master agreement through operation of Proposer’s corporate organization affiliation.

Line Item	Question	Response *
1	Provide the legal name of the Proposer authorized to submit this Proposal.	Enterprise Fleet Management, Inc.
2	In the event of award, is this entity the Responsible Supplier that will execute the master agreement with Sourcewell? Y or N.	EFM, Inc. will execute the Master Agreement with Sourcewell. Enterprise FM Trust is the Lessor.
3	Identify all subsidiaries, D.B.A., authorized affiliates, and any other entity that will be responsible for offering and performing delivery of Solutions within this Proposal (i.e. Responsible Supplier(s) that will execute a master agreement with Sourcewell).	Enterprise Fleet Management
4	Provide your CAGE code or Unique Entity Identifier (SAM):	6Q1F8
5	Provide your NAICS code applicable to Solutions proposed.	532112
6	Proposer Physical Address:	600 Corporate Park Drive, St. Louis, MO 63105
7	Proposer website address (or addresses):	efleets.com
8	Proposer’s Authorized Representative (name, title, address, email address & phone) (The representative must have authority to sign the “Proposer’s Assurance of Compliance” on behalf of the Proposer):	Billy Dobosz, Assistant Vice President, billy.j.dobosz@efleets.com, (314) 274-4799
9	Proposer’s primary contact for this proposal (name, title, address, email address & phone):	Roan Oropesa, Director of Government Marketing, roan.oropesa@efleets.com, (314) 274-4241
10	Proposer’s other contacts for this proposal, if any (name, title, address, email address & phone):	Michelle Rojas, Business Analyst, michelle.m.rojas@efleets.com, 314-274-4556

**Table 2A: Financial Viability and Marketplace Success (50 Points, applies to Table 2A and 2B)**

Line Item	Question	Response *
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<p>11</p>	<p>Provide a brief history of your company, including your company's core values, business philosophy, and industry longevity related to the requested Solutions.</p>	<p>Enterprise Mobility was founded in 1957 by Jack Taylor, a decorated World War II Navy fighter pilot. The organization is named after one of the aircraft carriers Jack served on the U.S.S. Enterprise.</p> <p>Jack built the organization on a simple business philosophy that guides us to this day: "Take care of customers and employees first, and everything else will follow."</p> <p>Nearly 70 years later, Enterprise Mobility is still privately owned and operates under the third generation of Taylor family leadership—Jack's granddaughter, Chrissy Taylor.</p> <p>In its operation, Enterprise Mobility has had only four CEOs – our founder Jack; his son, Andy Taylor; organization veteran Pamela Nicholson; and now Chrissy Taylor. Chrissy is a 25-year veteran of the business and part of the third generation of family owners.</p> <p>Our culture was built on a founding philosophy and an enduring set of values that guides every interaction, whether with customers, partners, communities or each other.</p> <p>What Enterprise Mobility is:</p> <p>Staying true to the founding values, guiding how we do business and how we give back to communities.</p> <p>Maintaining a culture of exceptional service, always putting people first—from team members and customers to partners and neighbors.</p> <p>Constantly innovating, pushing ourselves to deliver people-first experiences that meet the needs of those we serve in the rapidly evolving mobility landscape.</p> <p>Creating meaningful connections, collaborating to help move mobility forward.</p> <p>As mobility has evolved, so have we. What started as a fleet of just seven cars nearly 70 years ago has blossomed into a global network of diverse mobility solutions including car rental, fleet management, flexible vehicle hire, carsharing, vanpooling, car sales, truck rental, vehicle subscription, luxury rental, technology solutions and more.</p> <p>Enterprise Fleet Management, an affiliate of Enterprise Mobility, provides full-service fleet management for companies, government agencies, and organizations, as well as for those seeking an alternative to employee reimbursement programs. Enterprise Fleet Management supplies most makes and models of cars, light- and medium-duty trucks, and service vehicles across the U.S. and Canada, with local hands-on account management at its 60+ locations.</p> <p>In 2024, Enterprise Fleet Management was recognized by Automotive Fleet as the largest fleet management provider in the U.S.</p>
<p>12</p>	<p>What are your company's expectations in the event of an award?</p>	<p>While Enterprise Fleet Management has been an awarded contract for Sourcewell and was recognized as a top contract with over 97 percent of the spend in this category, we continue to look for ways to improve and deliver the best solutions to our government sector clients. We have expanded our Government sales support team and have grown our both our sales team and local offices providing even more reach to Sourcewell members. Enterprise has consistently delivered exceptional results. Our approach includes collaboration with Sourcewell, participation in academies and comprehensive training for our teams to ensure that our clients and prospects are aware of the awarded contract. Enterprise Fleet Management partners with Sourcewell members to deliver sustainable, cost-effective fleet programs that reduce total cost of ownership (TCO) and improve operational efficiency. Enterprise Fleet Management is committed to continuing this proven, compliant, and value-driven partnership with Sourcewell and its members. We provide: Personalized account management through localized, hands-on service. Industry-leading products and services tailored to member needs. Close relationships with the OEM Government Teams to maximize vehicle savings and availability Advanced technology and data-driven tools for informed decision-making. Enterprise Fleet Management fully complies with all federal, state, provincial, and local procurement regulations. We maintain audit-ready documentation, including detailed invoicing and contract records, to provide accountability and meet public-sector contract requirements.</p>

13	<p>Demonstrate your financial strength and stability with meaningful data. This could include such items as financial statements, SEC filings, credit and bond ratings, letters of credit, and detailed reference letters. Upload supporting documents (as applicable) in the document upload section of your response. DO NOT PROVIDE ANY TAX INFORMATION OR PERSONALLY IDENTIFIABLE INFORMATION.</p>	<p>As a privately held organization, Enterprise Mobility does not publicly disclose detailed financial information, but we can share several data points to reflect our strong financial performance.</p> <p>Enterprise Mobility has more than 90,000 global team members across 9,500-plus global locations and a fleet of over 2.4 million vehicles. In fiscal year 2025, our people-centric approach, combined with steady global growth and solid results across the business' portfolio – including fleet management, flexible vehicle hire, carsharing, vanpooling, car sales, truck rental, vehicle subscriptions and luxury rentals – generated more than \$39 billion in revenue for Enterprise Mobility, inclusive of its subsidiaries and affiliate Enterprise Fleet Management.</p> <p>Additionally, Enterprise Fleet Management continued to grow its fleet, with more than one million vehicles under management in the U.S. and Canada. Enterprise Fleet Management also received record-high customer satisfaction scores throughout the year.</p> <p>\$39 billion in fiscal-year 2025 revenue.</p> <p>Ranked 7th-largest private U.S. company by revenue (Forbes 2024).</p> <p>Global Presence:</p> <p>Over 90,000 team members worldwide.          Operations in 90+ countries and territories.          More than 9,500 rental branches globally.          A fleet of 2.4 million+ vehicles.</p> <p>Long-Term Strategy &amp; Stability:          Founded in 1957, with a legacy of reinvestment by the Taylor family.          Only four CEOs in company history, reflecting leadership stability.          Focus on intentional growth and people-first values.          Reinvestment into emerging technologies, markets, and services to ensure adaptability and long-term success.</p> <p>Credit Ratings:</p> <p>Standard &amp; Poor's: A- (Long-Term), A-1 (Short-Term)</p> <p>Moody's: A3 (Long-Term), P-2 (Short-Term)</p> <p>Morningstar DBRS: A (Long-Term), R-1 (low) (Short-Term)</p> <p>Enterprise Fleet Management Inc. holds a BBB+ corporate credit rating from Standard &amp; Poor's Rating Services, reflecting our strong financial position and commitment to a long-term business strategy.</p>
14	<p>What is your US market share for the Solutions that you are proposing?</p>	<p>Enterprise Fleet Management (EFM) is a leading provider in the U.S. leased fleet market, recognized by Automotive Fleet in 2024 as the nation's largest fleet management company. We closed our fiscal year with approximately 24% market share, managing over 750,000 leased vehicles and more than one million vehicles overall. Our services support thousands of public and private schools, colleges, universities, municipalities, and government agencies nationwide, including the management of over 200,000 public sector vehicles. This substantial market presence reflects Enterprise's leadership and ability to deliver scalable, innovative solutions across diverse industries, ensuring clients benefit from our deep expertise and robust infrastructure.</p>
15	<p>What is your Canadian market share for the Solutions that you are proposing?</p>	<p>Since launching Canadian operations in 2007, Enterprise Fleet Management has consistently grown at over 20% annually and over 200 percent in Western Canada, demonstrating market influence with now 6% of the Canadian leased fleet market share. EFM has now expanded to 5 offices in Canada with fully staffed teams to support our Canadian growth. This presence reflects our commitment to expanding services and delivering tailored fleet solutions that meet the unique needs of Canadian businesses.</p>
16	<p>Disclose all current and completed bankruptcy proceedings for Proposer and any included possible Responsible Party within the past seven years. Proposer must provide notice in writing to Sourcewell if it enters a bankruptcy proceeding at any time during the pendency of this RFP evaluation.</p>	<p>Enterprise Fleet Management, Inc. or Enterprise Mobility does not have any current or past bankruptcy's, we acknowledge it is our responsibility to disclose in writing to Sourcewell if this becomes applicable during the evaluation.</p>

<p>17</p>	<p>How is your organization best described: is it a manufacturer, a distributor/dealer/reseller, or a service provider? Answer the question that best applies to your organization, either a) or b).</p> <p>a) If your company is best described as a distributor/dealer/reseller (or similar entity), provide your written authorization to act as a distributor/dealer/reseller for the manufacturer of the products proposed in this RFP. If applicable, is your dealer network independent or company owned?</p> <p>b) If your company is best described as a manufacturer or service provider, describe your relationship with your sales and service force and with your dealer network in delivering the products and services proposed in this RFP. Are these individuals your employees, or the employees of a third party?</p>	<p>Service Provider</p> <p>Enterprise Fleet Management maintains a nationwide dealer network of over 17,000 dealerships, enabling us to source vehicles from any manufacturer to best support our clients individual fleet plans.</p> <p>Enterprise encourages use of 40,000+ Preferred Partners for the highest service quality and reduced downtime.</p> <p>Total network includes 90,000+ maintenance and repair shops nationwide, including dealers and National Account partners such as: Firestone, Michelin, Pep Boys, Tire Kingdom, Jiffy Lube, Valvoline Instant Oil Change, Goodyear, Discount Tire, and Grease Monkey.</p> <p>These partnerships provide customers with access to a nationwide network for routine maintenance and repairs beyond warranty coverage.</p> <p>This network allows us to:</p> <ul style="list-style-type: none"> <li>Secure competitive pricing and volume discounts</li> <li>Provide our clients an expansive network or options for maintenance, repairs and warranty.</li> <li>Arrange delivery options to clients as needed</li> <li>Vehicle upfitting</li> </ul> <p>Provide both new and used vehicles from existing inventory when needed</p> <p>We also maintain long-standing relationships with dealers to ensure consistent service and adherence to Enterprise standards.</p> <p>For Puerto Rico, all vehicles are priced based on dealer stock pricing, ensuring transparency and compliance with local market conditions.</p> <p>ASE-Certified Technicians: Review and negotiate repairs, ensuring quality and cost control</p> <p>Real-Time Maintenance Approvals: Electronic bid submission and approval thresholds to minimize downtime</p> <p>Warranty &amp; Goodwill Assistance: Proactive warranty checks and manufacturer goodwill negotiations for out-of-warranty repairs</p> <p>Manage the full upfit process, leveraging established relationships with local and national vendors to ensure vehicles are delivered in a work-ready state. We proactively coordinate with vendors to have equipment ready for installation upon vehicle delivery, minimizing downtime and ensuring vehicles are ready for service as quickly as possible.</p>
<p>18</p>	<p>If applicable, provide a detailed explanation outlining the licenses and certifications that are both required to be held, and actually held, by your organization (including third parties and subcontractors that you use) in pursuit of the business contemplated by this RFP.</p>	<p>Enterprise Fleet Management, Inc. is a corporation duly incorporated under the laws of the State of Missouri and officially registered with the Missouri Secretary of State on August 11, 2008. In addition to its incorporation in Missouri, Enterprise maintains active registration with the Secretary of State in every U.S. state where business operations are conducted, ensuring full compliance with applicable state regulations.</p> <p>For Canadian operations, Enterprise holds a valid business license for each location and adheres to all provincial and municipal requirements. Furthermore, where applicable, Enterprise secures and maintains dealer licenses in accordance with local laws and industry standards. These measures reflect our ongoing commitment to regulatory compliance and operational integrity across all jurisdictions in which we operate.</p>
<p>19</p>	<p>Disclose all current and past debarments or suspensions for Proposer and any included possible Responsible Party within the past seven years. Proposer must provide notice in writing to Sourcewell if it enters a debarment or suspension status any time during the pendency of this RFP evaluation.</p>	<p>Enterprise Fleet Management, Inc. or any Enterprise Mobility does not have any current or past debarments or suspensions, we acknowledge it is our responsibility to disclose in writing to Sourcewell if we are debarred or suspended during the evaluation.</p>

20	Describe any relevant industry awards or recognition that your company has received in the past five years.	<p>True to our founder's business philosophy of taking care of customers and employees, we know that team members are crucial to our ability to provide a great customer experience. That's why we work hard to provide an engaging and diverse and inclusive workplace that gives all team members plenty of opportunity to thrive, grow and advance. It's also a workplace that's built on a strong and enduring set of values that guide all interactions with customers, communities and one another. We're pleased that those efforts have been widely recognized. This is just a sampling of the recognition we've earned (Note prior to October 2023 corporate awards were under Enterprise Holdings corporate brand):</p> <ul style="list-style-type: none"> <li>• Recognized by Automotive Fleet in 2024 as the largest fleet management provider in the U.S.</li> <li>• 2025 Gallup® Exceptional Workplace Award, Third Consecutive Year (Enterprise Mobility)</li> <li>• 2025 Gallup® Exceptional Workplace Award, Third Consecutive Year (Enterprise Mobility)</li> <li>• 2024 North American and EMEA Candidate Experience (CandE) Award (Enterprise Mobility)</li> <li>• 2024 Early Talent Award by Handshake® (Enterprise Mobility)</li> <li>• 2024 World's Top Companies for Women, Forbes® (Enterprise Mobility)</li> <li>• 2023 America's Best Employers for Veterans, Forbes (Enterprise Mobility)</li> <li>• 2024 America's Best Large Employers, Forbes (Enterprise Holdings)</li> <li>• 2024 National Intern Day Top 100 Internship Programs, Yello and WayUp (Enterprise Mobility)</li> </ul> <p>In 2024, Enterprise Fleet Management received the Pioneer Partner Award, demonstrating exceptional commitment, persistence, and influence as an awarded vendor. Since receiving this award, we have continued our expansive growth serving Sourcewell members.</p>	*
21	What percentage of your sales are to the governmental sector in the past three years?	Enterprise Fleet Management is a privately owned family run business and does not release specific performance numbers to the public. Owned by the Taylor family of St Louis since 1957, Enterprise Fleet Management operates a network of more than 60 fully staffed offices, which manages a fleet of more than 1 million vehicles in the U.S and Canada. Enterprise Fleet Management provides services to thousands of public and private schools, colleges, universities, cities, counties, and other government entities nationwide to manage over 200,000 government vehicles. Over the past three years, over 20% of our clients have come from the government sector.	*
22	What percentage of your sales are to the education sector in the past three years?	Enterprise Fleet Management is a privately owned family run business and does not release specific performance numbers to the public. Owned by the Taylor family of St Louis since 1957, Enterprise Fleet Management operates a network of more than 60 fully staffed offices, which manages a fleet of close to one million vehicles in the U.S. and Canada. Enterprise Fleet Management provides services to hundreds of public and private schools, colleges, universities, cities, counties, and other government entities nationwide to manage over 200,000 government vehicles.	*
23	List all state, cooperative purchasing agreements that you hold. What is the annual sales volume for each of these agreement over the past three years?	<p>Enterprise Fleet Management partners with Sourcewell, TIPS, and E&amp;I to provide cooperative purchasing solutions.</p> <p>As a privately held company, we do not disclose specific performance metrics publicly. However, Enterprise offers services through purchasing cooperatives to public and private schools, colleges, universities, cities, counties, and other government entities.</p> <p>Based on our most recent business review with Sourcewell, Enterprise Fleet Management accounts for over 97% of the total sales volume under this contract. Additionally, more than 60% of our government-sector clients have utilized a purchasing cooperative, with Sourcewell being the most commonly used option.</p>	*
24	List any GSA contracts or Standing Offers and Supply Arrangements (SOSA) that you hold. What is the annual sales volume for each of these contracts over the past three years?	Enterprise Fleet Management, Inc. does not hold any contracts directly with the GSA.	*

**Table 2B: References/Testimonials**

Line Item 25. Supply reference information from three customers who are eligible to be Sourcewell participating entities.

Entity Name *	Contact Name *	Phone Number *
County of St. Joseph	Galen Pelletier	(574) 315-0584
City of Miami Gardens, Florida	Caleb Gunter	(302) 530-9215
City of San Marcos	Chad Johnson	(760) 752-7550

**Table 3: Ability to Sell and Deliver Solutions (150 Points)**

Describe your company's capability to meet the needs of Sourcewell participating entities across the US and Canada, as applicable. Your

response should address in detail at least the following areas: locations of your network of sales and service providers, the number of workers (full-time equivalents) involved in each sector, whether these workers are your direct employees (or employees of a third party), and any overlap between the sales and service functions.

Line Item	Question	Response *
26	Sales force.	<p>Enterprise Fleet Management has an unparalleled salesforce, enabling year-over-year growth of the Sourcewell partnership and earning us the Sourcewell Pioneer Award. Each of our more than 60 Enterprise Fleet Management offices is fully staffed to handle all areas of our customers' fleet programs, including sales. EFM currently has over 1,000 field employees that are all dedicated to supporting our clients and delivering exceptional service and an additional 2,525 that support our field operations in departments like IT, Maintenance, Product, Compliance, etc.</p> <p>Key positions within the local offices include:</p> <p>Fleet Management Director</p> <ul style="list-style-type: none"> <li>• The director of the local leadership team who can assist in resolving escalated customer service needs regarding Sourcewell member' s fleet management services.</li> </ul> <p>Fleet Strategy Manager</p> <ul style="list-style-type: none"> <li>• Works with Client Strategy Manager to maximize resale/disposal of fleet vehicles ensuring maximum return on assets to members</li> <li>• Works with wholesalers nationwide to sell vehicles, maximize sales price on behalf of our clients and getting their proceeds as quickly as possible</li> </ul> <p>Maintaining relationships with local dealers to get members best pricing and vehicle availability throughout</p> <p>Finance Manager</p> <ul style="list-style-type: none"> <li>• A member of the local leadership team who can assist in resolving escalated customer service needs assist in implementing funding strategies regarding the entities fleet.</li> </ul> <p>Account Executive</p> <ul style="list-style-type: none"> <li>• Designs, reviews and implements fleet management programs</li> <li>• Supports the Client Strategy Manager in handling Sourcewell' s ongoing fleet needs</li> </ul> <p>Area Sales Manager</p> <ul style="list-style-type: none"> <li>• Provides a managerial oversight to the Account Executive and Client Strategy Manager and can provide additional support to the Sourcewell member as needed</li> </ul> <p>Client Strategy Manager</p> <ul style="list-style-type: none"> <li>• Implements fleet management programs specifically designed for Sourcewell member's</li> <li>• Reviews Sourcewell member' s Fleet Profile on a regular basis</li> <li>• Proactively forecasts vehicle replacement needs</li> <li>• Secondary point of contact for fleet related matters</li> </ul> <p>Account Fleet Coordinator</p> <ul style="list-style-type: none"> <li>• Primary contact for Sourcewell member' s fleet needs</li> <li>• Administers all day-to-day fleet-related matters</li> <li>• Works with Client Strategy Manager to provide turnkey fleet management</li> <li>• Works directly with Sourcewell member' s employees on fleet issues</li> </ul> <p>Additionally, Enterprise has a dedicated government team that works day in and day out supporting our local offices and our local teams. These folks have demonstrated a deep understanding of the government sector and ensure that clients are consistently meeting their fleet objectives. The assure compliance, due diligence and proper fleet strategies are proposed to each member.</p> <p>All in, Enterprise is uniquely positioned to maintain our leadership position supporting the government sector and providing value to the Sourcewell members. We have an unparalleled salesforce that allows for hands on fleet management and an ability to sit with local stake holders to develop, tweak and implement fleet strategies resulting in both financial and operational savings to our clients. Additionally, this illustrates that many of our employees live in the communities they serve.</p>

<p>27</p>	<p>Describe the network of Authorized Sellers who will deliver Solutions, including dealers, distributors, resellers, and other distribution methods.</p>	<p>As the largest purchaser of vehicles in North America, Enterprise Fleet Management has the ability to source vehicles from nearly any manufacturer. Based on what is best for the client we can factory order directly from the manufacturer, acquire from dealer stock inventory or secure used vehicles from our existing inventory to meet client requirements.</p> <p>Enterprise Fleet Management maintains a database of over 17,000 dealers to facilitate vehicle delivery or out of stock needs. Unless otherwise specified, we begin our search with our preferred dealers with lowest fees and closest to the driver's location. Our goal is to secure the best overall value for all parties, leveraging volume discount opportunities whenever possible. We often work with the same dealers to ensure consistency and familiarity with Enterprise's standards and customer expectations. To ensure a smooth transaction, we provide dealers with detailed step-by-step instructions, including payment procedures. Our CD dealers are expected to:</p> <ul style="list-style-type: none"> <li>Accept and inspect the vehicle for damage or missing equipment.</li> <li>File claims and arrange necessary repairs if required.</li> <li>Prepare the vehicle for delivery, including post-delivery inspection, cleaning, and installation of any equipment.</li> <li>Deliver the vehicle promptly to the driver, provide excellent customer service, and demonstrate vehicle features.</li> <li>Complete title and registration applications and install license plates or temporary tags.</li> </ul> <p>Our processes ensure compliance with competitive bidding requirements, cooperative purchasing agreements, and documentation standards. We maintain transparency in pricing, provide detailed invoicing, and follow all contract terms established by the awarding entity or cooperative purchasing program.</p>
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<p>28</p>	<p>Service force.</p>	<p>Enterprise Fleet Management has over 60 offices across North America, staffed by more than 1,000 sales professionals. These professionals conduct thousands of meetings each month, demonstrating how Enterprise Fleet Management's programs help government organizations optimize their fleets. As part of these demonstrations, our team consistently positions the Sourcewell cooperative contract as the most efficient way to implement fleet strategies. All sales professionals are trained to recommend cooperative purchasing contracts during the sales process to:</p> <p>Enterprise Fleet Management has over 2,500 employees in numerous departments to we can best support our clients needs. This teams number one priority is to maintain the highest levels of service in the industry and are measured closely in the Enterprise Service Quality Index.</p> <p>National Service Department Staff of approximately 250 professionals, including: 75+ Maintenance Coordinators for preventive maintenance, fluid services, brakes, and tires. 125+ Service Advisors for all types of repairs, from oil changes to major mechanical issues. 50+ Service Coordinators for towing, lockouts, jump starts, flat tire changes, and related services.</p> <p>Additionally, we offer Call Center Support with a single toll-free number for all customer support needs, including: Vehicle maintenance Roadside assistance Accident management</p> <p>The call center is staffed exclusively by Enterprise Fleet Management associates to ensure consistent service quality. Hours of Operation Maintenance Team: Monday–Friday: 6:00 a.m. – 9:00 p.m. CST Saturday: 7:00 a.m. – 4:00 p.m. CST</p> <p>Roadside Assistance Team: Monday–Friday: 5:00 a.m. – 9:00 p.m. CST Saturday: 7:00 a.m. – 4:00 p.m. CST After Hours: Roadside calls are routed to partner vendors. Roadside assistance is available 24/7.</p> <p>Supplier Network Enterprise encourages use of 40,000+ Preferred Partners for the highest service quality and reduced downtime. Total network includes 90,000+ maintenance and repair shops nationwide, including dealers and National Account partners such as: Firestone, Michelin, Pep Boys, Tire Kingdom, Jiffy Lube, Valvoline Instant Oil Change, Goodyear, Discount Tire, and Grease Monkey. These partnerships provide customers with access to a nationwide network for routine maintenance and repairs beyond warranty coverage.</p> <p>Compliance with Procurement Rules Enterprise Fleet Management adheres to all federal, state, and local procurement regulations. Our vendor network and service agreements are structured to meet competitive bidding and cooperative purchasing requirements. We maintain audit-ready documentation, including detailed invoicing and service records, to ensure transparency and accountability. All processes align with public procurement standards, mitigating risk and ensuring legal compliance.</p>
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29	Describe the ordering process. If orders will be handled by distributors, dealers or others, explain the respective roles of the Proposer and others.	<p>Enterprise Fleet Management has a dedicated ordering team located at our corporate office in St. Louis, responsible for placing factory orders with all major manufacturers. We utilize advanced system tools and an internal database to transmit orders electronically between departments and most OEMs, ensuring accuracy and efficiency. In addition, this team works closely with the OEMs to secure the best applicable incentive for each client based on their needs often identifying additional savings opportunities by comparing incentives across channels.</p> <p>Our ordering team has direct access to:                  Manufacturer ordering systems                  Official ordering guides                  Assigned manufacturer contacts for assistance with ordering, scheduling, and tracking inquiries                  Access to OEM Brand and Technical Teams                  OEM Incentive Guides and Contacts                  Tracking Details to ensure effective communication on ordering status</p> <p>This streamlined process allows Enterprise to manage large volumes of factory orders effectively each day and maintain strong relationships with manufacturers for timely delivery and support.</p>
30	Describe in detail the process and procedure of your customer service program, if applicable. Include your response-time capabilities and commitments, as well as any incentives that help your providers meet your stated service goals or promises.	<p>Enterprise uses a Service Quality index (SQi) to measure customer satisfaction for each of our brands. ESQi enables Enterprise to link our employees' career and financial aspirations to consistent and superior service levels with every customer. ESQi is one of the many ways in which we remind ourselves to put our customers' needs first. We also use our customer satisfaction data to monitor changing industry trends, needed enhancements, and local service issues to continually improve and distinguish our service from the competition. The result has been millions of satisfied Enterprise customers, thousands of successful employees, and a company that continues to grow.</p> <p>Customer Service Philosophy                  Our goal is to create lifelong relationships with all our Enterprise customers and to exceed expectations through superior customer service. Our founding values are one of the many ways in which we remind ourselves to put our customers' needs first. The result has been millions of satisfied Enterprise customers, thousands of successful employees, and a company that continues to grow.</p> <p>Founding Values Our founding values are a simple yet powerful set of beliefs that drives us and are how we hold ourselves accountable every day. Over the years we have formalized the values into a set of guiding principles that every employee can understand and embrace:</p> <ul style="list-style-type: none"> <li>• Our brands are the most valuable things we own.</li> <li>• Personal honesty and integrity are the foundation of our success.</li> <li>• Customer service is our way of life.</li> <li>• Our company is a fun and friendly place, where teamwork rules.</li> <li>• We work hard...and we reward hard work.</li> <li>• Great things happen when we listen...to our customers and to each other.</li> <li>• We strengthen our communities, one neighborhood at a time.</li> <li>• Our doors are open.</li> </ul> <p>In addition to our ESQi metric, our teams our measured and several on Service Key Performance Indicators such as response time, ensuring we are proactively meeting with and communicating with our clients as well as several others. At Enterprise, service is a way of life.</p>
31	Describe your ability and willingness to provide your products and services to Sourcwell participating entities.	<p>Enterprise Fleet Management provides local sales support through more than 60 offices across North America, staffed by over 1,000 trained sales professionals. These teams conduct thousands of meetings each month to help government organizations optimize their fleets and consistently position the Sourcwell cooperative contract as the most efficient procurement solution. By recommending cooperative purchasing during the sales process, our professionals streamline procurement, reduce administrative burden, and enhance the overall customer experience.</p>
32	Describe your ability and willingness to provide your products and services to Sourcwell participating entities in Canada.	<p>Enterprise Fleet Management is fully capable of providing our complete range of fleet management services to Sourcwell member agencies in Canada and has over 100 government agencies already partnered in Canada and growing.</p> <p>We currently operate four dedicated teams within Canada to support local clients. While our services are broadly available, some geographical limitations apply in certain regions of Canada.</p> <p>Our Canadian teams include French-speaking account managers and customer service representatives to ensure clear communication and compliance with local language requirements.</p> <p>All documentation, contracts, and client communications can be provided in both official languages upon request.</p> <p>Enterprise remains committed to delivering consistent, high-quality service across all areas where coverage is available, while meeting language and regulatory requirements.</p>

33	Identify any geographic areas of the United States or Canada that you will NOT be fully serving through the proposed agreement.	Enterprise Fleet Management is dedicated to providing comprehensive service coverage throughout the United States and Canada. While most regions are supported by a local Enterprise office, remote areas are serviced by the nearest available location to ensure continuity. Regardless of geographic challenges, Enterprise remains fully committed to collaborating with Sourcewell participating entities to identify effective solutions and deliver the highest level of service and support, no matter the location.	*
34	Identify any account type of Participating Entity which will not have full access to your Solutions if awarded an agreement, and the reasoning for this.	We provide comprehensive fleet management services to hundreds of public and private schools, colleges, universities, cities, counties, and other government entities nationwide. Our extensive infrastructure and experienced teams allow us to deliver personalized, local support while leveraging national resources for cost efficiency and operational excellence.  Enterprise Fleet Management is committed to helping government organizations optimize their fleets through proven strategies, compliance with procurement regulations, and industry-leading service standards.	*
35	Define any specific requirements or restrictions that would apply to our participating entities in Hawaii and Alaska and in US Territories.	Enterprise Fleet Management currently has leased vehicles in Hawaii, Alaska, and Puerto Rico. We operate in full compliance with local laws and statutes in these regions. All vehicles leased in Puerto Rico are priced based on dealer stock pricing to ensure transparency and adherence to local market conditions as factory ordering is not generally available by the OEM's into Puerto Rico  Enterprise Fleet Management is committed to providing consistent, compliant, and high-quality service across all regions where coverage is available.	*
36	Will Proposer extend terms of any awarded master agreement to nonprofit entities?	Yes	*

**Table 4: Marketing Plan (100 Points)**

Line Item	Question	Response *
37	Describe your marketing strategy for promoting this opportunity. Upload representative samples of your marketing materials (if applicable) in the document upload section of your response.	<p>As previously demonstrated, with over 97% of the spend in this category and recognition as a Sourcewell Pioneer Partner Award recipient, Enterprise Fleet Management's ability to market and grow this contract is unmatched. Our marketing and outreach efforts have resulted in triple-digit growth for Sourcewell, and we continue to dedicate resources and emphasize this partnership.</p> <p>Enterprise Fleet Management will continue to collaborate with Sourcewell to develop a customized marketing strategy that leverages our extensive sales infrastructure across North America. Our scale and resources allow us to respond quickly to increased demand and ensure maximum program visibility.</p> <p>Enterprise's approach ensures broad awareness, proactive engagement, and measurable results, driving adoption and delivering value to Sourcewell members. Our marketing strategy for promoting this opportunity focuses on a full-funnel, multi-channel approach tailored to government agencies:</p> <p>Dedicated Landing Page: A government-specific page with a clear call-to-action to capture interest and drive engagement.</p> <p>Targeted Campaigns: Performance-driven media buys and social campaigns aimed at prospective government clients.</p> <p>Email Nurture Programs: Ongoing email nurture campaigns to educate and convert leads over time.</p> <p>Cross-Channel Visibility: Promotion of the partnership on the Enterprise website, which attracts millions of visitors annually, ensuring broad exposure.</p> <p>Involvement at Tradeshows and National Associations: Enterprise is an active member in many National Assoc and trade shows i.e. National League of Cities, Government Finance Officers Assoc, etc.</p> <p>This integrated strategy combines digital advertising, social engagement, and content-driven tactics to maximize awareness and lead generation within the government sector.</p>

<p>38</p>	<p>Describe your use of technology and digital data (e.g., social media, metadata usage) to enhance marketing effectiveness.</p>	<p>We leverage technology and digital data extensively to enhance marketing effectiveness across the entire funnel:</p> <p>Targeted Media Campaigns: We run an “always-on” digital media buy that uses algorithms to reach B2B C-suite and executive decision-makers in key industries. Ads are placed across major platforms (i.e. LinkedIn, Meta, Gmail, Newsweek, etc.) and retarget visitors who engage with our site but don’t convert.</p> <p>Search Engine Marketing (SEM): We actively bid on high-value category keywords (e.g., fleet management terms) and brand keywords to ensure visibility at the top of search results. We also monitor competitor keyword strategies to optimize performance marketing.</p> <p>Search Engine Optimization (SEO): We create content (articles, white papers) aligned with trending search terms to improve organic rankings and maintain organic, non-paid visibility.</p> <p>Business Listings: We maintain and pay for local business listings to capture location-based searches, giving us a competitive edge over competitors with fewer offices.</p> <p>Data-Driven Optimization: We track performance metrics like Marketing Qualified Leads, new accounts, fleet size, and potential. Insights from these data points guide continuous optimization of ad placements and keyword strategies.</p> <p>Sales Enablement &amp; CRM Integration: We use Salesforce and Pardot for compliant email campaigns and nurture programs, supporting both new account growth and current client engagement.</p> <p>In short: Our approach leverages integrated, cross-channel marketing activations—combining advanced targeting, retargeting, keyword bidding, SEO, and data analytics—to drive brand awareness, consideration, and lead generation while supporting sales growth.</p> <p>Additionally, as the leading fleet management company in the U.S., Enterprise Fleet Management executive leaders consistently share expertise by speaking at industry events and with media. Subject-matter experts are regularly featured in Automotive Fleet, Government Fleet, and other trade publications given the organization’s position in the industry. For example, Enterprise recently published the whitepaper “Winning Strategies for Driving Down Costs and Maximizing Value in the Public Sector” alongside the article “Supercharge Government Fleet Operations with Breakthrough Flexibility,” which achieved 37.7K impressions through Smart City’s digital channels. Enterprise Fleet Management also works with customers to generate media coverage about new partnerships and initiatives. For example, Enterprise Fleet Management partnered with the City of South Pasadena to announce the nation’s first all-electric police fleet, earning coverage in top tier media publications, including Fox Business, Los Angeles Times, POLITICO, as well as pick up from the Associated Press.</p>
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39	<p>In your view, what is Sourcewell's role in promoting agreements arising out of this RFP? How will you integrate a Sourcewell-awarded agreement into your sales process?</p>	<p>We expect Sourcewell to maintain an unbiased recommendation of the awarded contracts in this category allowing us to illustrate why Enterprise Fleet Management is the market leader and provides the best value proposition to its members. We expect Sourcewell to continue to promote and assist in answering specific questions from Sourcewell members regarding contract utilization and how to utilize the awarded contracts effectively.</p> <p>We expect Sourcewell to continue to maintain collaborative relationship with Enterprise to resolve issues promptly, encourage innovation, and ensure consistent compliance, quality and service.</p> <p>As a result of earning this RFP, we will continue to make sure that are of our government sector clients are aware of this contract and its details. We will continue to train and ensure that our 60 fully staffed offices across North America are trained to recommend cooperative purchasing contracts to eligible entities during the sales process to ensure a more efficient and timelier implementation. Our teams receive in-depth training on how these contracts work and the benefits of utilizing them over other procurement options.</p> <p>Additionally, we will continue to promote the contract as part of our public sector marketing efforts.</p> <p>Enterprise Fleet Management expects Sourcewell to maintain an impartial stance in recommending awarded contracts within this category, enabling us to demonstrate why EFM is the market leader and delivers the strongest value proposition to its members. We also anticipate Sourcewell's continued support in promoting the contract and assisting members with questions regarding utilization and best practices.</p> <p>We look forward to sustaining a collaborative relationship with Sourcewell to resolve issues promptly, foster innovation, and ensure consistent compliance, quality, and service.</p> <p>Following this award, Enterprise will continue to ensure that government-sector clients are fully informed about the contract and its benefits. Our 60+ fully staffed offices across North America will remain trained to recommend cooperative purchasing agreements during the sales process, ensuring efficient and timely implementation. Each team receives in-depth training on contract terms and the advantages of cooperative procurement compared to other options.</p> <p>Additionally, we will continue to incorporate this contract into our public-sector marketing strategy. As a current Sourcewell-awarded vendor, Enterprise has consistently delivered exceptional results—holding more than 97% of category spend and ranking among Sourcewell's top contracts. Our goal is not only to maintain this success but to identify new opportunities to enhance and expand the program.</p>
40	<p>Are your Solutions available through an e-procurement ordering process? If so, describe your e-procurement system and how governmental and educational customers have used it.</p>	<p>Enterprise Fleet Management provides a tailored ordering and procurement process for each Sourcewell member agency to ensure alignment with their unique needs and objectives. Our Approach Includes:</p> <p>Dedicated Account Teams: Each member agency is assigned a local account team that will meet directly with the agency to understand specific requirements.</p> <p>Customized Vehicle Menu: Based on these discussions, we create a menu of vehicle options that the member can utilize for ordering, including available makes, models, and configurations.</p> <p>Transparent Quoting Process: After selections are finalized, Enterprise provides a detailed quote for each vehicle category, which must be reviewed and approved by the agency's authorized signer before the order is placed, this accomplished via DocuSign simplifying the process for Sourcewell members and maintaining accurate ordering.</p> <p>Compliance with Procurement Rules</p> <p>Enterprise Fleet Management adheres to all federal, state, provincial, and local procurement regulations throughout the ordering process. All processes align with public sector requirements, mitigating risk and ensuring legal conformity for member agencies.</p> <p>This approach ensures accuracy, transparency, and compliance, while delivering a streamlined experience for Sourcewell members.</p>

**Table 5A: Value-Added Attributes (100 Points, applies to Table 5A and 5B)**

Line Item	Question	Response *
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<p>41</p>	<p>Describe any product, equipment, maintenance, or operator training programs that you offer to Sourcewell participating entities. Include details, such as whether training is standard or optional, who provides training, and any costs that apply.</p>	<p>Training and Onboarding clients is a priority for Enterprise Fleet Management as we want to ensure that they are maximizing the return on the services in which they are enrolling in. Below are examples of our Training and Onboarding plan:</p> <p>Implementation Plan  Our implementation approach is designed to ensure a smooth, efficient, and fully supported transition for Sourcewell and its drivers. A dedicated local account team will take full ownership of the implementation process, managing all aspects from planning to execution.  Training and Onboarding Services  We will provide and host all driver training and onboarding services, including:</p> <ul style="list-style-type: none"> <li>Live and recorded webinars</li> <li>Conference calls for Q&amp;A and support</li> <li>Printed training materials</li> <li>Online instructional videos</li> <li>Additional customized resources as needed</li> </ul> <p>These services are tailored to Sourcewell's specific requirements and the unique needs of your drivers. Our team will work closely with you to review all available options and develop a clear, customized implementation roadmap. This ensures alignment with your goals and minimizes disruption to your operations.</p> <p>Cost and Support  There are no additional costs for implementation and transition services. These are included as part of our standard service offering. Our goal is to make the process as easy and effective as possible, laying the groundwork for a successful long-term partnership.</p> <p>Post-Implementation Support  Following implementation, our team remains actively engaged to ensure continued success and optimal performance of the program. Post-implementation support includes:</p> <ul style="list-style-type: none"> <li>Dedicated Account Management: Your local account team will continue to serve as your primary point of contact, providing ongoing guidance and support.</li> <li>Driver and Staff Assistance: We offer continuous access to training resources, including refresher webinars, updated materials, and on-demand video content.</li> <li>Performance Monitoring: We will regularly review program metrics and user feedback to identify opportunities for improvement and ensure alignment with your goals.</li> <li>Issue Resolution: Our support team is available to promptly address any questions, concerns, or technical issues that may arise.</li> <li>Program Optimization: As your needs evolve, we will work with you to adjust and enhance the program, ensuring long-term value and satisfaction.</li> </ul> <p>All post-implementation support services are included in our standard offering at no additional cost, reinforcing our commitment to a successful and lasting partnership.</p> <p>When applicable we will leverage our third party partners as experts for additional training, such as OEM, Telematics, Fuel etc.</p>
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<p>42</p>	<p>Describe any technological advances that your proposed Solutions offer.</p>	<p>Since 2015, Enterprise has invested over \$500 million in information technology (IT) solutions to better serve its customers. This includes the launch of a mobile app and customer login website, making it more convenient for companies, government agencies and organizations to monitor and manage all aspects of their fleets on the go.</p> <p>Like the rest of our organization, our technology focus is to provide our customers and employees with the information and tools they need to be successful. We set our budgets and project priorities to accomplish this goal, all while trying to keep costs at a reasonable level. We examine input from our customers, Client Advisory board, field team, and corporate personnel to determine the list of projects to pursue. Our website and mobile app remain a top priority to ensure a great customer experience, and we continue to invest in adding new features and capabilities. A significant modernization of the customer website is also planned to start in late 2025. Our current roadmap is highlighted below and share's recent enhancements, as well as an outlook to our investment over the next 24 months.</p> <p>Summer to Winter 2025:</p> <ul style="list-style-type: none"> <li>- Mobile App Design Update – Updated look and feel to the mobile app design. This update includes performance updates and new language support for Spanish and French Canadian.</li> <li>- Digital Glovebox – Allow storage and management of key documents such as vehicle insurance via the website and mobile app.</li> <li>- Vehicle Order Tracker - Knowing where your vehicle order is in the process is key to your business. Customers will soon be able to monitor and track their vehicle orders from ordering a vehicle, adding aftermarket equipment, to estimated time for delivery.</li> <li>- Integrated Fuel card ordering &amp; management within the current EFleets website in collaboration with WEX.</li> </ul> <p>Future Investment within 24 Months:</p> <ul style="list-style-type: none"> <li>- Modernized digital experience with new capabilities, simplifying reporting and supporting critical tasks for customers.</li> <li>- Integrated connected vehicle technology with vehicle health and maintenance dashboards supporting both ICE and EV vehicle types.</li> <li>- Advanced maintenance tracking as well as maintenance authorization, scheduling, and other self-service capabilities.</li> </ul>
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<p>43</p>	<p>Describe any “green” initiatives that relate to your company or to your Solutions, and include a list of the certifying agency for each.</p>	<p><b>Green Initiatives and Environmental Stewardship</b>          Enterprise Fleet Management is deeply committed to sustainability across its operations, services, and partnerships. Our environmental initiatives are designed to support our customers’ sustainability goals while reducing the overall ecological footprint of fleet operations. These efforts span fleet optimization, carbon accountability, facilities management, and corporate social responsibility.</p> <p><b>Fleet Optimization and Vehicle Cycling</b>          Enterprise helps customers make environmentally responsible decisions through data-driven fleet management. By analyzing emissions, fuel efficiency, and lifecycle costs, we enable smarter vehicle cycling that reduces environmental impact.</p> <p>Emissions tracking and reporting          Fuel efficiency analysis          Remediation cost evaluation          Support for low-emission and fuel-efficient vehicle selection</p> <p><b>Carbon Reporting and Offsets</b>          Enterprise simplifies emissions benchmarking and offers verified carbon offset solutions through:</p> <p>TerraPass – A third-party partner investing in renewable energy and carbon reduction projects</p> <p>Certifying Agencies: Verified Carbon Standard (VCS), Climate Action Reserve (CAR)</p> <p>Enterprise Holdings Foundation matches a portion of each customer’s offset purchase to amplify impact</p> <p><b>Energy and Facilities Management</b>          Our corporate headquarters in St. Louis, Missouri, reflects our commitment to sustainable building practices:</p> <p>LEED Gold Certification in 2012 from the U.S. Green Building Council          Built on previously developed land to minimize environmental disruption          Low-flow fixtures reduce water usage by 46%          LED lighting reduces electricity usage by 56%          92% of construction waste recycled or repurposed</p> <p><b>Corporate Social Responsibility (CSR)</b>          Enterprise Fleet Management, as an affiliate of Enterprise Holdings, supports long-term community growth and environmental sustainability through:</p> <p>Promotion of alternative fuels and mobility solutions          Increased access to fuel-efficient vehicles          Resource-efficient operations and waste minimization          Carbon offset programs for vehicle leasing and rental          Support for local and global philanthropic initiatives          Disaster relief and community development efforts</p> <p>Our CSR Governance Council oversees a robust set of policies, including:</p> <p>Carbon Offsets          Duty of Care          Supplier Code of Conduct          Human Rights          Safety Recalls          Workplace Ethics          Equal Opportunity Employment          Founding Values          Privacy and Safe Harbor          Subsidiary and Franchisee Sustainability Standards</p> <p><b>Sustainable Maintenance Programs</b>          We take a practical approach to sustainable transportation by focusing on small changes that make a big impact:</p> <p>Recycling and repurposing materials          Comprehensive vehicle maintenance to reduce waste and costs          Responsible material management          Windshield recycling          Use of water-based paints          Re-refining oil and recycling filters          Tire repurposing          License plate renewal practices          Prioritization of fuel-efficient vehicles</p>
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<p>44</p>	<p>Identify any third-party issued eco-labels, ratings or certifications that your company has received for the Solutions included in your Proposal related to energy efficiency or conservation, life-cycle design (cradle-to-cradle), or other green/sustainability factors.</p>	<p>Third-Party Sustainability Certifications and Eco-Labels</p> <p>1. LEED Gold Certification (2012) one year certification to recognize our energy-efficient design.</p> <p>Certifying Agency: U.S. Green Building Council                  Scope: Enterprise Fleet Management's corporate headquarters in St. Louis                  Details: Recognized for energy-efficient design, water conservation, LED lighting, and recycling of construction waste. This is the second-highest level of LEED certification available and reflects a strong commitment to sustainable building practices.</p> <p>2. Verified Carbon Offsets</p> <p>Certifying Agency: TerraPass (partnered with Verified Carbon Standard and Climate Action Reserve)                  Scope: Carbon offset programs offered to customers                  Details: Enterprise helps customers offset fleet emissions by investing in renewable energy and carbon reduction projects. The Enterprise Holdings Foundation matches a portion of each customer's offset purchase.</p> <p>3. ISO 14001 (Enterprise Holdings sustainability practices)</p> <p>Certifying Agency: International Organization for Standardization (ISO)                  Scope: Environmental Management Systems (EMS)                  Details: ISO 14001 provides a framework for improving resource efficiency, reducing waste, and ensuring environmental compliance. While not explicitly listed for Enterprise Fleet Management, it is commonly adopted by large organizations with sustainability programs.</p> <p>4. Cradle to Cradle Certified (Referenced in sustainability resources)</p> <p>Certifying Agency: Cradle to Cradle Products Innovation Institute                  Scope: Life-cycle design and product sustainability                  Details: This certification is relevant for evaluating products based on material health, reuse, renewable energy, water stewardship, and social fairness and not applicable to our services.</p> <p>Enterprise Mobility annually submits to leading ESG platforms to benchmark and improve our sustainability performance. We maintain a "Fast Mover" designation with EcoVadis, reflecting our proactive approach to sustainability, and currently hold a strong SAQ score of 83. Additionally, we report to CDP, where we have achieved a score of C, demonstrating our commitment to transparency and continuous improvement in climate-related disclosures. Additional information on our sustainability platform can be found on our mobility website. <a href="https://www.enterprisemobility.com/content/dam/enterpriseholdings/marketing/our-impact/sustainability/esg-report/esg-report-fy24.pdf">https://www.enterprisemobility.com/content/dam/enterpriseholdings/marketing/our-impact/sustainability/esg-report/esg-report-fy24.pdf</a></p>
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<p>45</p>	<p>What unique attributes does your company, your products, or your services offer to Sourcewell participating entities? What makes your proposed solutions unique in your industry as it applies to Sourcewell participating entities?</p>	<p>Enterprise Fleet Management offers a suite of solutions uniquely positioned to serve Sourcewell participating entities. Our approach combines deep industry expertise, national infrastructure, and a customer-first mindset to deliver unmatched value. Key differentiators include:</p> <p>1. Fleet Expertise and Scale As part of Enterprise Holdings, we manage and operate over 1.85 million vehicles globally, giving us unparalleled insight into:</p> <p>Industry trends and regulatory changes Vehicle recalls and manufacturer updates Residual values and model enhancements</p> <p>This scale allows us to bring proven strategies and real-time market intelligence to Sourcewell members.</p> <p>2. Nationwide Infrastructure and Local Support With over 60 fleet management offices nationwide and over 1,000 field employees, our local account teams provide personalized, face-to-face service. This proximity ensures responsive support and tailored solutions for each participating entity. Our people are part of developing, implementing and enhancing fleet strategies for our clients and are often asked to speak, present and be present at council meetings, board workshops, etc.</p> <p>3. Total Cost of Ownership (TCO) Optimization We apply our internal fleet management expertise to help Sourcewell members reduce costs across:</p> <p>Acquisition Maintenance Fuel Depreciation Resale</p> <p>Our data-driven approach ensures decisions are made with full visibility into cost impacts. We help our clients identify the right vehicles for the application at the best cost and also ensure that they are properly using the assets often facilitating disposal of under utilized assets.</p> <p>4. Logistics and Operational Efficiency Enterprise's experience in managing its own fleet logistics—vehicle pickup, delivery, and movement—translates into faster, more efficient service for our clients. We understand the operational challenges and solve them proactively.</p> <p>5. Vehicle Resale and Remarketing Our nationwide network of remarketing professionals and offices allows us to maximize resale value through the most effective channels. We invest more in this area than any competitor, ensuring optimal returns for Sourcewell entities. This allows us to avoid auctions where often returns are less and fees come with that service.</p> <p>6. In-House Claims and Subrogation Services As a self-insured company, Enterprise has dedicated in-house teams managing physical damage claims and subrogation. This internal expertise leads to faster resolution, reduced costs, and better outcomes for our clients.</p> <p>7. Additional services available to Sourcewell Members Enterprise Mobility is an awarded vendor under the category "Near-new vehicle purchasing" allowing access to sourcewell members to purchase pre-owned vehicles at a discounted rate. Through Enterprise and National, we provide a comprehensive industry-leading business rental program Public-Sector pricing available through our mobility experts <a href="https://www.enterprise.com/en/business-car-rental/publicsector.html">https://www.enterprise.com/en/business-car-rental/publicsector.html</a></p>
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46	Describe in detail any facilitation or support services offered when OEM warranty work is required for vehicle acquired via your offering.	<p><b>Warranty and Repair Support</b>                      Enterprise Fleet Management partners with a network of national account providers to offer nationwide warranties and corporate-level support for vehicle repairs. Warranty coverage varies based on the type of repair and the parts used, but our process ensures that customers receive the maximum benefit available.                      Our ASE-certified technicians are trained to identify potential warranty opportunities by reviewing each vehicle's service and repair history. When repairs fall just outside of standard warranty coverage, our team refers the vehicle to the dealer. In many cases, our National Service Department can pursue goodwill assistance from the manufacturer to help cover eligible repairs.                      This proactive approach ensures that Sourcewell participating entities receive the most cost-effective and comprehensive support possible throughout the lifecycle of their fleet.</p> <p>Enterprise Fleet Management takes a proactive approach to helping clients minimize repair costs, especially when vehicles are just outside of standard warranty coverage. The goodwill assistance process involves the following steps:</p> <p><b>Warranty Review by Technicians</b>                      Enterprise's ASE-certified technicians carefully review each vehicle's service and repair history to identify potential warranty coverage. This includes checking for manufacturer warranties and extended coverage options.</p> <p><b>Referral to Dealer for Out-of-Warranty Repairs</b>                      If a repair falls just outside the warranty period, the vehicle is referred to the appropriate dealership for further evaluation.</p> <p><b>Engagement of National Service Department (NSD)</b>                      Enterprise's National Service Department steps in to advocate on behalf of the client. They work directly with the manufacturer to request goodwill assistance—a discretionary coverage offered by manufacturers for repairs that are no longer under warranty but meet certain criteria (e.g., low mileage, consistent maintenance history, recent warranty expiration).</p> <p><b>Negotiation and Approval</b>                      The NSD leverages Enterprise's strong manufacturer relationships and repair data to negotiate coverage. If approved, the manufacturer may cover part or all of the repair cost, reducing the financial burden on the client.</p> <p><b>Client Notification and Repair Coordination</b>                      Once goodwill assistance is secured, Enterprise coordinates the repair and communicates the outcome to the client, ensuring transparency and minimal downtime.                      This process reflects Enterprise's commitment to cost savings and customer advocacy, helping Sourcewell participating entities get the most value from their fleet investment.</p>
47	Describe any service standards or guarantees that apply to your services (policies, metrics, KPIs, etc.).	<p><b>Key Performance Indicators</b>                      Enterprise Fleet Management measures performance through a variety of metrics designed to reduce total cost of ownership and improve operational efficiency for our clients. For Sourcewell members, our goal is to deliver measurable savings and strategic value across all aspects of fleet management.                      We focus on the following areas to drive results:</p> <ul style="list-style-type: none"> <li>Active vehicle lifecycle management to reduce fuel and maintenance expenses</li> <li>Annual benchmarking of fuel and maintenance spend to identify cost-saving opportunities</li> <li>Vehicle comparison analysis to recommend models with the best total cost of ownership</li> <li>Proactive fleet planning and forecasting to increase equity at disposal</li> <li>Continuous resale market review to determine optimal disposal timing and method</li> <li>Resale performance tracking against industry benchmarks to ensure competitive returns</li> <li>Incentive program management to reduce acquisition costs</li> <li>Vehicle application review to "right-size" fleet based on operational needs</li> <li>Driver and administrator feedback analysis to enhance satisfaction and usability</li> </ul> <p><b>Enterprise Fleet Management Performance Savings KPIs</b></p> <ul style="list-style-type: none"> <li>\$97 million in total maintenance and repair savings</li> <li>\$96 million in manufacturer incentives passed directly to customers</li> <li>\$30 million in negotiated repair savings, with 20–40% discounts on parts and labor through our network of 90,000 partner shops</li> <li>109% resale performance compared to Black Book's Commercial Vehicle Index (CVI), exceeding industry standards</li> </ul> <p>Additionally, we measure and monitor several Customer Service KPI's like our ESQI scores to ensure that we are proving our clients the best experience in the industry.</p>

**Table 5B: Value-Added Attributes**

Line Item	Question	Certification	Offered	Comment
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<p>48</p>	<p>Select any Women or Minority Business Entity (WMBE), Small Business Entity (SBE), or veteran owned business certifications that your company or hub partners have obtained. Upload documentation and a listing of dealerships, HUB partners or resellers if available. Select all that apply.</p>		<p><input type="radio"/> Yes  <input checked="" type="radio"/> No</p>	<p>While we do not hold any certifications, Enterprise Fleet Management is proud of its legacy as a veteran-founded and woman-led organization—an identity that reflects our deep commitment to service, leadership, and inclusion.</p> <p>The company was founded in 1957 by Jack C. Taylor, a decorated U.S. Navy fighter pilot who served aboard the USS Enterprise during World War II. Inspired by the values of integrity, discipline, and teamwork he learned in the military, Jack named the company after the aircraft carrier and built it on the principle: “Take care of your customers and employees first, and profits will follow.” [en.wikipedia.org]</p> <p>Today, Enterprise Fleet Management is led by Chrissy Taylor, the third generation of the Taylor family and one of the most prominent female CEOs in the global transportation industry. Chrissy began her career as a management trainee and rose through the ranks, holding 17 different positions before becoming President &amp; CEO in 2020. Under her leadership, the company continues to innovate, expand its sustainability efforts, and champion diversity across its operations. This unique combination of military heritage and female executive leadership sets Enterprise Fleet Management apart in the industry and aligns with the values of Sourcewell participating entities that prioritize integrity, service, and inclusive representation.</p> <p>Enterprise Fleet Management is deeply committed to the principles of equal employment opportunity (EEO) and affirmative action (AA). These values are embedded in our company culture and communicated through:</p> <p>Our employee handbook  Mandatory companywide diversity training  Prominent postings in all branch offices nationwide</p> <p>We actively promote diversity, equity, and inclusion across our workforce and supplier relationships, and we are proud of our veteran ownership and woman leadership history, which reflect our dedication to representation and opportunity.  Support for Small Business Enterprise (SBE) &amp; Minority and Women Business Enterprise (MWBE)  Enterprise Fleet Management takes a proactive approach to engaging and supporting SBE/MWBE vendors through the following initiatives:</p> <p>Identifying opportunities for certified SBE/MWBE vendors to provide goods and services  Outreach efforts, including letters to interested vendors encouraging proposals and maintaining a log of all communications  Encouraging certification for eligible vendors and assisting with bonding, credit, and insurance requirements  Negotiating in good faith with all interested and certified SBE/MWBE vendors  Membership and support of local and national minority, women, and small business organizations  Advertising in DBE-focused publications to attract qualified vendors  Encouraging drivers to utilize DBE and M/WBE vendors for maintenance and repair services based on operational needs</p> <p>Enterprise and its affiliate, National, are active members of numerous local and national programs, including:</p> <p>National Minority Supplier Development Council (NMSDC) affiliates  Ethnic chambers of commerce  National Association of Women Business Owners (NAWBO) chapters  Women’s Business Enterprise National Council (WBENC) regional chapters  Urban League chapters</p> <p>These efforts reflect our ongoing commitment to building inclusive partnerships and promoting economic opportunity for underrepresented groups.</p>
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49		Minority Business Enterprise (MBE)	<input type="radio"/> Yes <input checked="" type="radio"/> No	N/A	*
50		Women Business Enterprise (WBE)	<input type="radio"/> Yes <input checked="" type="radio"/> No	N/A	*
51		Disabled-Owned Business Enterprise (DOBE)	<input type="radio"/> Yes <input checked="" type="radio"/> No	N/A	*
52		Veteran-Owned Business Enterprise (VBE)	<input type="radio"/> Yes <input checked="" type="radio"/> No	N/A	*
53		Service-Disabled Veteran-Owned Business (SDVOB)	<input type="radio"/> Yes <input checked="" type="radio"/> No	N/A	*
54		Small Business Enterprise (SBE)	<input type="radio"/> Yes <input checked="" type="radio"/> No	N/A	*
55		Small Disadvantaged Business (SDB)	<input type="radio"/> Yes <input checked="" type="radio"/> No	N/A	*
56		Women-Owned Small Business (WOSB)	<input type="radio"/> Yes <input checked="" type="radio"/> No	N/A	*

**Table 6A: Pricing (400 Points, applies to Table 6A, 6B, 6C, 6D, 6E)**

Provide detailed pricing information in the questions that follow below.

Line Item	Question	Response *
57	Describe your payment terms and accepted payment methods.	Payment Terms Standard payment terms are Net 30. Payment Options Enterprise Fleet Management offers multiple convenient payment methods for Sourcwell participating entities:  Direct Debit: Automatic withdrawal on the 20th of each month. One-Time ACH: Payments can be initiated via phone or email. Check: Payments may be mailed or sent via overnight delivery. Wire/ACH Push: Can be arranged through Enterprise's designated banking partner.

58	Describe any leasing or financing options available for use by educational or governmental entities.	<p>Your local Enterprise Fleet Management team will collaborate with you to customize lease terms and deliver the most cost-effective solutions tailored to your operational needs. Enterprise offers four primary funding options:</p> <p>1. Open-Ended Equity Lease A flexible solution ideal for organizations needing adaptable vehicle lifecycle funding. Key features include:</p> <p>No early termination penalties—vehicles can be returned at any time Payoff amount always applies; equity from vehicle resale can be applied to future leases If the resale value is less than the payoff, the difference is billed to the agency No mileage restrictions or wear-and-tear charges Improved cash flow and flexible financing Ownership rights retained by the agency Lease terms based on actual vehicle usage, not fixed timelines</p> <p>This lease finances the difference between the vehicle's purchase price and a conservative Reduced Book Value (RBV), based on anticipated market value. Agencies pay only for the time the vehicle is in use, improving budget flexibility.</p> <p>2. Closed-End Lease Designed for low-mileage drivers, this option offers:</p> <p>Lower monthly payments Fixed lease terms (terms and miles) No residual risk at lease end. Simply turn the vehicle in</p> <p>3. Prepaid Lease Ideal for entities seeking interest savings:</p> <p>All lease payments made upfront Access to discounted interest rates Simplified budgeting</p> <p>4. Open-Ended Lease Finance For entities preferring vehicle ownership</p> <p>Leases are written down to a zero book value allowing for easier transfer of ownership at term if desired Suitable for long-term asset retention Service Charge and any pass through LTT fees are applicable for Title</p> <p>Lease Term Flexibility Enterprise offers lease terms ranging from 12 to 60 months for all vehicle classes and up to 72 months on specialty vehicles.</p> <p>While initial terms do not exceed 60 months Open-Ended Leases can be extended:</p> <p>Continue month-to-month until the RBV is fully paid Pay off the RBV at 60 months Extend for an additional term Once the vehicle Reduced Book Value is fully satisfied, Sourcewell members can keep on Enterprises books for the original management fee</p>	*
59	Describe any standard transaction documents that you propose to use in connection with an awarded agreement (order forms, terms and conditions, service level agreements, etc.). Upload all template agreements or transaction documents which may be proposed to Participating Entities.	We have attached our sample contracts.	*
60	Do you accept the P-card procurement and payment process? If so, is there any additional cost to Sourcewell participating entities for using this process?	We cannot accept a P-card payment at this time.	*

61	<p>Describe your pricing model (e.g., line-item discounts or product-category discounts). Provide detailed pricing data (including standard or list pricing and the Sourcewell discounted price) on all of the items that you want Sourcewell to consider as part of your RFP response. If applicable, provide a SKU for each item in your proposal. Upload your pricing materials (if applicable) in the document upload section of your response.</p>	<p><b>Inclusive, Upfront Pricing</b> Enterprise Fleet Management understands the challenges of calculating both direct and indirect fleet costs. That's why we provide transparent, inclusive pricing upfront, along with predictive cost tools to help Sourcewell participants plan effectively for fleet expenses throughout the year—and beyond.</p> <p><b>Integrity and Transparency</b> We prioritize clarity and trust. Our contracts are straightforward, with no hidden fees. Your dedicated Client Strategy Manager will offer honest, data-driven recommendations tailored to your needs. You'll also have full access to the same fleet data via our Client Website, ensuring complete visibility and collaborative decision-making.</p> <p><b>Flexible Financing Options</b> Enterprise offers a range of leasing and financing solutions to meet diverse operational and budgetary needs, including:</p> <ul style="list-style-type: none"> <li>Open-End Lease</li> <li>Closed-End Lease</li> <li>Prepaid Lease</li> <li>Self-Funded Programs</li> </ul> <p>We work closely with each client to identify the best-fit financing structure and adapt to evolving requirements.</p>	*
62	<p>Quantify the pricing discount represented by the pricing proposal in this response. For example, if the pricing in your response represents a percentage discount from MSRP or list, state the percentage or percentage range.</p>	<p><b>Manufacturer Discounts &amp; Capitalized Cost</b> Enterprise Fleet Management leverages its national purchasing power to secure significant discounts for Sourcewell members. Discounts typically range from 5% to 25% off the Manufacturer's Suggested Retail Price (MSRP). For example:</p> <p>MSRP for a Ford Explorer: \$36,540 Delivered Price: \$31,232 Savings: Approximately 15%</p> <p>In some cases, manufacturers may also offer free optional equipment, providing additional value and cost savings when available. Capitalized Cost is calculated as:</p> <p>Factory Invoice Price Minus manufacturer-provided incentives Minus any applicable advertising fees</p> <p>This pricing structure ensures transparency and maximizes value for Sourcewell participants and as the largest purchaser of vehicles in North America, we leverage our OEM relationships to ensure the best solutions are offered to our sourcewell members.</p>	*
63	<p>Describe any quantity or volume discounts or rebate programs that you offer.</p>	<p><b>Incentive Management &amp; Ancillary Discounts</b> Enterprise Fleet Management works diligently to secure the best available incentives for Sourcewell members through:</p> <p>A dedicated team of incentive analysts at our operations headquarters Strong partnerships with manufacturers and relationships with dealers Ongoing collaboration with manufacturer zone representatives</p> <p>Our team actively tracks a wide range of incentives and maintains a comprehensive database that compares these against standard fleet, association, and upfit incentives. This allows us to identify and apply the most advantageous offers for each client. In some cases, manufacturers provide exclusive incentives to Enterprise that are not available through other channels. These are applied strategically to maximize savings for Sourcewell participants. For ancillary programs such as Full Maintenance and Maintenance Management, Enterprise passes through additional discounts on parts and labor, further enhancing cost efficiency.</p> <p>Volume/High Quantity discounts from Enterprise Fleet Management are also available to Sourcewell members based on individual member needs</p>	*

64	<p>Propose a method of facilitating “sourced” products or related services, which may be referred to as “open market” items or “non-contracted items”. For example, you may supply such items “at cost” or “at cost plus a percentage,” or you may supply a quote for each such request.</p>	<p>Enterprise Fleet Management provides comprehensive support for sourcing and installing aftermarket equipment. Enterprise will provide a quote for each sourced product that will include any discounts that Enterprise receives. We do not mark-up any quotes or charge for coordinating supply or installation - this is a part of Enterprise’s standard service and additional value added service to our clients. Enterprise Fleet Management will coordinate the up-fit of any needed aftermarket equipment such as toolboxes, lights, signage, service bodies etc. We have established relationships with local and national vendors that supply these items and will deliver the equipment in a work-ready state.</p> <p>Enterprise will plan ahead with vendors to have equipment ready for installation once the ordered vehicles are delivered to ensure that the vehicles are ready for service as soon as possible. Enterprise will negotiate on behalf of the member agency to leverage volume discounts and deliver the lowest possible price on any needed equipment. The equipment can be billed up front or capitalized as a part of the lease structure. In both scenarios, the member will own the equipment at the conclusion or termination of the lease. Enterprise is able to sell customer-owned units as an additional benefit if the end user signs our consignment agreement. We have included a sample consignment agreement.</p> <p>Another example of Enterprise Fleet Managements open source at cost is vehicle electrification. In the event that a client wants to electrify their fleet, we do not markup vehicle chargers or installation, we introduce them to our national partners and allow them access to the services at no markup.</p>	*
65	<p>Identify any element of the total cost of acquisition that is NOT included in the pricing submitted with your response. This includes all additional charges associated with a purchase that are not directly identified as freight or shipping charges. For example, list costs for items like pre-delivery inspection, installation, set up, mandatory training, or initial inspection. Identify any parties that impose such costs and their relationship to the Proposer.</p>	<p>Vehicle registration fees, as applicable based on end user, are passed through directly to the end user without markup. All other costs are addressed within Enterprise’s inclusive pricing structure provided in the RFP response.</p>	*
66	<p>If freight, delivery, or shipping is an additional cost to the Sourcewell participating entity, describe in detail the complete freight, shipping, and delivery program.</p>	<p>Enterprise Fleet Management typically arranges for vehicles to be delivered to the dealer closest to the end user, allowing for convenient pickup. Alternatively, Enterprise can coordinate delivery through the dealer or Enterprise personnel. Delivery charges may apply, depending on distance and other logistical factors.</p>	*
67	<p>Specifically describe freight, shipping, and delivery terms or programs available for Alaska, Hawaii, Canada, or any offshore delivery.</p>	<p>Enterprise Fleet Management maintains a broad network of dealerships and local personnel across supported regions. This includes staff from Enterprise Fleet Management offices and affiliated Enterprise Rent-A-Car and National Car Rental locations. These resources are available to assist with vehicle delivery and pickup, ensuring efficient logistics and responsive service for Sourcewell member agencies.</p>	*
68	<p>Describe any unique distribution and/or delivery methods or options offered in your proposal.</p>	<p>Enterprise Fleet Management employs one of the largest driver teams in the industry, enabling efficient coordination of vehicle pickups, deliveries, and transfers. With a global fleet of 1.85 million units operated in partnership with Enterprise Holdings, we manage logistics daily, giving us deep expertise and agility in navigating complex delivery scenarios for our fleet customers.</p>	*

69	Specifically describe any self-audit process or program that you plan to employ to verify compliance with your proposed agreement with Sourcewell. This process includes ensuring that Sourcewell participating entities obtain the proper pricing.	<p>Enterprise Fleet Management enforces compliance through a combination of system controls, regular audits, and transparent reporting:</p> <p>1. System-Level Controls</p> <p>A dedicated pricing plan for Sourcewell is hard coded into Enterprise's internal systems. This pricing structure is locked, meaning it cannot be modified by any sales or support team member. All quotes and transactions for Sourcewell members are automatically tied to this pricing plan, ensuring consistency and adherence to contract terms.</p> <p>2. Delivery &amp; Transaction Audits</p> <p>Enterprise conducts monthly reviews of all vehicles on order prior to delivery processed under the Sourcewell program. These audits verify that pricing, incentives, and services provided align with Sourcewell contract requirements. Any discrepancies are investigated and resolved prior to billing to maintain program integrity.</p> <p>3. Internal Oversight</p> <p>Enterprise's Client Strategy Managers and compliance teams are trained to uphold Sourcewell contract standards. Any updates to pricing, incentives, or program terms are reviewed and approved centrally before implementation.</p>	*
70	If you are awarded an agreement, provide a few examples of internal metrics that will be tracked to measure whether you are having success with the agreement.	<p>Internal Metrics &amp; Customer Satisfaction Tracking</p> <p>Enterprise Fleet Management tracks key performance indicators to ensure program success and continuous improvement. Example metrics include:</p> <p>New customers utilizing the Sourcewell contract Total vehicle orders placed Total deliveries completed</p> <p>Our goal is to build lifelong customer relationships, and we actively monitor satisfaction through multiple channels:</p> <p>Internal Service Quality Index (SQi) External surveys, including the J.D. Power Satisfaction Survey Customer service inquiries and feedback</p> <p>These results are closely reviewed, and process improvements are implemented as needed to ensure we consistently meet or exceed customer expectations.</p>	*
71	Provide a proposed Administration Fee payable to Sourcewell. The Fee is in consideration for the support and services provided by Sourcewell. The proposed Administrative Fee will be payable to Sourcewell on all completed transactions to Participating Entities utilizing this Agreement. The Administrative Fee will be calculated as a stated percentage, or flat fee as may be applicable, of all completed transactions utilizing this Master Agreement within the preceding Reporting Period defined in the agreement.	<p>Enterprise will offer Sourcewell and your members access to our fleet management program and pay Sourcewell a quarterly marketing fee based upon the volume of Combined New Deliveries generated as defined below.</p> <p>Deliveries to qualified members during the term of the contract is \$150.00 per new delivery. Qualified members are eligible members who utilize the Agreement between Sourcewell and Enterprise Fleet Management as an approved means to satisfy proper due diligence and competitive requirements. Enterprise Fleet Management retains the right to offer discounted promotional pricing on a market-by-market basis.</p>	*

**Table 6B: Pricing Grid: Acquisition Terms**

Provide detailed pricing information in the table below.

Line Item	Type	Charged/Percentage/Fees	Details	
72	Interest Rate Index Used	3- Year T- Bill Canadian 3 Year Bond	3- Year T- Bill Canadian 3 Year Bond	*
73	Basis Points	350 Basis Points (US and Canada)	350 Basis Points (US and Canada)	*
74	Domestic Factory Order Vehicles	Manufacturers Published Invoice Less all applicable incentives (+) \$170 Acquisition Fee plus courtesy delivery fee that is a pass-through charge from the delivering dealer	Manufacturers Published Invoice Less all applicable incentives (+) \$170 Acquisition Fee plus courtesy delivery fee that is a pass-through charge from the delivering dealer	*
75	Foreign Factory Order Vehicles	Manufacturers Published Invoice Less all applicable incentives (+) \$170 Acquisition Fee plus courtesy delivery fee that is a pass-through charge from the delivering dealer	Manufacturers Published Invoice Less all applicable incentives (+) \$170 Acquisition Fee plus courtesy delivery fee that is a pass-through charge from the delivering dealer	*
76	Domestic Dealer Stock Vehicles	Dealer Provided Invoice or Buyer sheet Less (-) Applicable Incentives plus (+) \$170 acquisition fee, (+) any applicable dealer fees; subject to dealer availability, applies to all Dealer ordered vehicles	Dealer Provided Invoice or Buyer sheet Less (-) Applicable Incentives plus (+) \$170 acquisition fee, (+) any applicable dealer fees; subject to dealer availability, applies to all Dealer ordered vehicles	*
77	Foreign Dealer Stock Vehicles	Dealer Provided Invoice or Buyer sheet Less (-) Applicable Incentives plus (+) \$170 acquisition fee, (+) any applicable dealer fees; subject to dealer availability, applies to all Dealer ordered vehicles	Dealer Provided Invoice or Buyer sheet Less (-) Applicable Incentives plus (+) \$170 acquisition fee, (+) any applicable dealer fees; subject to dealer availability, applies to all Dealer ordered vehicles	*

**Table 6C: Pricing Grid: Incentives**

Provide detailed pricing information in the table below.

Line Item	Type	Charged/Percentage/Fees	Details	
78	Federal Tax Incentives	no charge/fee/100% passed	EFM passes through all eligible and applicable incentives to end users at no charge	*
79	State Tax Incentives	no charge/fee/100% passed	EFM passes through all eligible and applicable incentives to end users at no charge	*
80	Manufacturer Incentives	no charge/fee/100% passed	100% of end user eligible incentives are passed to the member (Manufacturer Regional or State Incentive for specific model available at time of order available to the member) EFM also works closely with the manufacturers to achieve the highest available incentive and thus reducing cost to end user	*

**Table 6D: Pricing Grid: Maintenance & Fees**

Provide detailed pricing information in the table below.

Line Item	Type	Charged/Percentage/Fees	Details
81	Fixed Maintenance	Variable	Enterprise offers a comprehensive fixed maintenance program that includes both preventative and non-preventative maintenance services. This program can be customized to incorporate additional components such as brakes, tires, and replacement rentals, allowing for a fully budgeted maintenance solution throughout the vehicle's term. Pricing Structure Rates vary based on vehicle type, annual mileage, and usage application. On average, pricing ranges from \$40 to \$90 per month, depending on these factors. Coverage is available for vehicles up to 100,000 miles and includes:  All routine maintenance as recommended by the manufacturer Unplanned repairs, provided they are not the result of misuse or abuse  This program is designed to provide predictable maintenance costs and minimize unexpected expenses over the life of the vehicle.
82	Occurance Maintenance	\$6 per month per vehicle	\$6 per month card fee per vehicle plus cost of service and parts. No out of network fees or additional roadside service fees.
83	Management Fee	0.10% for Factory Ordered Vehicles 0.15% for Dealer Stock Vehicles	0.10% for Factory Ordered Vehicles 0.15% for Dealer Stock Vehicles
84	Service Charge	US \$400 CA \$495	US \$400 CA \$495 per vehicle at the end of the Lease
85	Lease Termination Fee	Equity Leases: \$0 Net Leases: three months rent plus 30% of the total rent due	\$0 Termination Fee for Equity Leases, refer to Section 3 of Master Lease Agreement for settlement process. Termination Fees for Net Leases are an amount equal to three months rent plus 30% of the total rent due under the master walk away lease agreement.
86	Interim Interest Yes/No, How is it calculated?	Yes	Enterprise Charges Interim interest from the date that Enterprise pays for the vehicle + aftermarket equipment (if applicable) until it is delivered. It is calculated as follows: (3 Yr T-bill/Ca Bond Rate + 350 BP) x vehicle + aftermarket equipment cost (if applicable) / 365 x number of days between the paid for date and deliver date)
87	Resale Fee	\$400	For each Vehicle sold, the End User "Member" shall pay Enterprise a fee of \$400.00 ("Service Fee") plus towing at prevailing rates, applies to member owned/non-leased units. This is not in addition to the service charge as it is only applicable to non-Enterprise leased vehicles. This is an optional service.
88	Provide fees not listed + rate	Optional services provided	See pricing matrix for services available to Sourcwell Members but not referenced here

**Table 6E: Pricing Offered**

Line Item	The Pricing Offered in this Proposal is: *	Comments
89	The pricing offered is as good as or better than pricing typically offered through existing cooperative contracts, state contracts, or agencies.	Enterprise Fleet Management leverages its national purchasing power to secure significant discounts for Sourcewell members. Discounts typically range from 5% to 25% off the Manufacturer's Suggested Retail Price (MSRP). This pricing structure ensures transparency and maximizes value for Sourcewell participants and as the largest purchaser of vehicles in North America, we leverage our OEM relationships to ensure the best solutions are offered to our sourcewell members.

**Table 7A: Depth and Breadth of Offered Solutions (200 Points, applies to Table 7A and 7B)**

Line Item	Question	Response *
90	Provide a detailed description of all the Solutions offered, including used Solutions if applicable, offered in the proposal.	<p>Enterprise Fleet Management provides a full-service, customizable fleet management program designed to optimize performance, reduce total cost of ownership, and improve operational efficiency for Sourcewell participating entities. Our solutions are backed by the infrastructure and expertise of Enterprise Holdings, the world's largest fleet operator.</p> <p>1. Fleet Acquisition &amp; Leasing</p> <p>Equity Lease &amp; Closed-End Lease Options: Flexible financing models tailored to organizational needs                      Vehicle Selection Support: Side-by-side comparisons of makes and models based on cost, fuel efficiency, and suitability                      Manufacturer Incentives: Access to national fleet discounts and rebates, passed directly to customers</p> <p>2. Used Vehicle Solutions</p> <p>Certified Pre-Owned Fleet Vehicles: Access to high-quality, well-maintained used vehicles from Enterprise's own fleet                      Resale Expertise: Enterprise sold over 126,000 client vehicles in 2024 at an average of 109% above Black Book's CVI, maximizing equity returns [efleets.com]                      Multi-Channel Remarketing: Vehicles are sold through the most effective channels to ensure optimal resale value</p> <p>3. Fleet Planning &amp; Optimization</p> <p>Client Strategy Managers: Local experts who build and manage customized fleet plans                      Lifecycle Management: Strategic planning for acquisition, maintenance, and disposal to reduce costs                      Fleet Electrification Consulting: Insights and planning support for transitioning to electric vehicles [efleets.com]</p> <p>4. Maintenance Programs</p> <p>Nationwide Network of 90,000+ Service Centers                      ASE-Certified Technicians: Review and negotiate repairs, ensuring quality and cost control                      Real-Time Maintenance Approvals: Electronic bid submission and approval thresholds to minimize downtime                      Warranty &amp; Goodwill Assistance: Proactive warranty checks and manufacturer goodwill negotiations for out-of-warranty repairs [efleets.com]</p> <p>5. Technology &amp; Reporting Tools</p> <p>Customer Website: Real-time fleet oversight, customizable dashboards, and</p>

automated alerts

Mobile App: Driver tools including roadside assistance, maintenance locator, mileage tracking, and accident reporting

Annual Client Review: Year-over-year analysis of fleet performance and cost-saving opportunities

Fleet Planning Toolkit: Total cost analysis and vehicle replacement timing recommendations

#### 6. Accident & Claims Management

24/7 Claims Support

In-House Subrogation Team: Enterprise is self-insured and manages claims internally, ensuring fast and efficient resolution

#### 7. Sustainability Solutions

Carbon Reporting & Offsets: Verified carbon offset programs through TerraPass

Fleet Emissions Analysis: Data-driven insights to support environmental goals

LEED Gold-Certified Headquarters: Reflects our commitment to energy efficiency and sustainable operations

#### 8. Fleet Electrification

EFM has the ability to help Sourcewell clients with their electrification journey including:

Acquisition of BEV

Implementation of Charging Strategies

Home and Workplace Charging procurement and installation

#### 9. Telematics

EFM has partnerships with telematics partners such as Geotab, a Sourcewell awarded contract that can be offered to its clients. As Geotab is an awarded partner, we do not charge any additional fees on top of the Geotab's pricing.

#### 10. Total Mobility Solution

Enterprise Mobility is the worlds largest and most trusted mobility provider. As such, we ensure that our clients have access to all of our services such as Daily Rental for short term needs and our Sourcewell Awarded Car Sales division.

We have also attached a full proposal with a detailed description of all our offerings.

91	Within this RFP category there may be subcategories of solutions. List subcategory titles that best describe your products and services.	<p>1. Fleet Acquisition &amp; Leasing</p> <p>Equity Lease and Closed-End Lease options New and certified pre-owned vehicle sourcing Manufacturer incentives and fleet discounts Vehicle selection and specification consulting</p> <p>2. Fleet Planning &amp; Optimization</p> <p>Lifecycle cost analysis Fleet right-sizing and application review Vehicle cycling strategy Electrification consulting and EV planning</p> <p>3. Maintenance &amp; Repair Management</p> <p>Nationwide network of 80,000+ service providers ASE-certified technician support Real-time maintenance approvals Warranty and goodwill assistance Preventive maintenance scheduling</p> <p>4. Accident &amp; Claims Management</p> <p>24/7 accident reporting and support In-house subrogation and claims processing Physical damage claims management Roadside assistance coordination</p> <p>5. Technology &amp; Reporting Tools</p> <p>Online customer portal with fleet dashboards Mobile app for drivers (mileage tracking, alerts, accident reporting) Fleet Planning Toolkit Annual Client Review and performance benchmarking</p> <p>6. Vehicle Resale &amp; Remarketing</p> <p>Multi-channel remarketing strategy Resale performance tracking Disposal timing optimization Used vehicle resale and equity return maximization</p> <p>7. Sustainability &amp; Environmental Solutions</p> <p>Carbon emissions reporting Verified carbon offset programs (via TerraPass) LEED Gold-certified headquarters Sustainable maintenance practices</p> <p>8. Compliance &amp; Risk Management</p> <p>Safety recall tracking Regulatory updates and compliance support Driver policy and program consultation</p> <p>9. Vendor Diversity &amp; Inclusion</p> <p>Support for SBE/MWBE vendor engagement Outreach and certification assistance Membership in diversity-focused organizations (e.g., NMSDC, WBENC, NAWBO)</p>
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**Table 7B: Depth and Breadth of Offered Solutions**

Indicate below if the listed types or classes of Solutions are offered within your proposal. Provide additional comments in the text box provided, as necessary.

Line Item	Category or Type	Offered *	Comments
92	Services for the acquisition by Sourcewell participating entities, whether by lease or financing, of on-road vehicles of all types or classifications, all weight classes, and all engine types;	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	Enterprise Fleet Management offers a full suite of acquisition services tailored to meet the diverse needs of Sourcewell participating entities. Our solutions support the procurement of on-road vehicles across all types,

weight classes, and engine configurations, including electric, hybrid, and internal combustion engines.

Enterprise provides a range of customizable funding solutions to align with each entity's operational and budgetary requirements. These Flexible Lease and Financing Options include:

Open-Ended Equity Lease: Offers flexibility to exit the lease at any time, with equity gains returned or applied to future leases. No mileage restrictions or wear-and-tear penalties.

Closed-Ended Lease: Ideal for low-mileage drivers, offering predictable monthly payments.

Prepaid Lease: Allows upfront payment to take advantage of discounted interest rates.

#### End-of-Lease Flexibility

At the conclusion of a lease term, Sourcewell members can:

- Renew vehicles with new models.

Equity can either be rolled into the next vehicle or taken as a credit

- Turn in the vehicle and take the equity

- Extend the lease term until Book Value is paid off

- Once RBV is paid off, clients can opt to take the title or keep on our books at the mgmt fee rate

#### Fleet Selection and Planning Tools \*

Enterprise supports informed decision-making through:

Vehicle Selector Lists: Expertly curated based on cost, fuel economy, safety, and driver satisfaction

Fleet Planning Toolkit: Models total cost of ownership and evaluates productivity and brand impact

Side-by-Side Comparisons: Ensures selection of the most cost-efficient vehicles for each application

#### Ordering and Tracking Technology

We've developed proprietary system tools and databases that enable seamless electronic transmission of orders across departments. Our ordering team has direct access to:

Manufacturer systems and ordering guides

Assigned contacts for scheduling and tracking inquiries

Real-time order tracking with manufacturers

Drivers can monitor vehicle status via the Enterprise website or mobile app, and once vehicles arrive, our Account Fleet Coordinators work directly with drivers to arrange convenient pickup or delivery.

#### Client Strategy Support

Each Sourcewell member is assigned a Client Strategy Manager who:

Performs cost analysis to optimize

			<p>vehicle cycling Ensures vehicle selection aligns with operational needs and budget boundaries Provides ongoing consultation to maximize fleet efficiency and value.</p>	
93	<p>New vehicle service and preparation for the vehicles described in 92 above, such as pre-delivery inspection, parts and accessories, installation, and vehicle marking application or installation;</p>	<p><input checked="" type="radio"/> Yes <input type="radio"/> No</p>	<p>New Vehicle Service and Preparation Enterprise Fleet Management provides comprehensive new vehicle service and preparation to ensure that each vehicle is ready for deployment upon delivery. Our process includes: Pre-Delivery Inspection (PDI) Prior to acceptance of a vehicle, our courtesy delivery dealers perform a thorough inspection to ensure quality and readiness. This includes:</p> <p>Checking for any damage or missing equipment Cleaning the vehicle interior and exterior Installing any required equipment or accessories</p> <p>Parts and Accessories Installation Enterprise coordinates the installation of parts and accessories based on the specific needs of Sourcwell participating entities. This may include:</p> <p>Safety equipment Technology packages Upfitting for specialized use Comfort and performance enhancements</p> <p>Vehicle Marking and Branding We offer full support for the application and installation of vehicle markings, including:</p> <p>Logos and decals Fleet identification numbers Reflective safety striping Custom branding aligned with each entity's visual standards</p> <p>Order Management and Tracking Our proprietary system tools and database allow for seamless electronic transmission of orders between departments. Our ordering team has direct access to:</p> <p>Manufacturer systems and ordering guides Assigned contacts for scheduling and tracking inquiries Real-time order tracking throughout the production and delivery process</p> <p>Drivers can monitor vehicle status via the Enterprise website or mobile app, and once vehicles arrive, our Account Fleet Coordinators work directly with drivers to arrange the most convenient pickup or delivery method.</p>	*
94	<p>Preventative maintenance plans, vehicle maintenance and repair services, and related service level agreements for Sourcwell participating entity on-road vehicle fleets of all types;</p>	<p><input checked="" type="radio"/> Yes <input type="radio"/> No</p>	<p>Enterprise Fleet Management offers a nationwide maintenance and repair network that spans the entire United States and Canada. Our extensive parts network allows us to source components quickly, minimizing vehicle downtime. Through our leveraged relationships with repair shops, we're</p>	

able to pass on discounted rates to our customers—resulting in average repair costs that are typically lower than the industry standard.

**Full Maintenance Program**

Enterprise's Full Maintenance program provides comprehensive coverage for most makes and models in your fleet. This program is fully managed by Enterprise and requires no internal approvals or monthly invoice reviews. Key Features:

Fixed monthly cost for the term of the vehicle

Coverage up to 100,000 miles

All manufacturer-recommended routine services

Unexpected repairs (excluding damage or neglect)

24/7 roadside assistance and towing

Optional coverage for brakes, tires, loaner vehicles, windshield repair, and fueling services

Automated service reminders via

Enterprise's website and mobile app

**Maintenance Management Program**

This program offers similar benefits to Full Maintenance but operates on a pay-as-needed basis. Repairs are charged directly to Sourcewell members, with Enterprise managing the process and contacting clients only when additional approval is required.

Flat monthly fee

Repairs authorized and managed by Enterprise

Vendor pricing negotiated to fair market value

**Maintenance and Repair Process**

All maintenance is coordinated through Enterprise using our local network of facilities. This reduces administrative burden for Sourcewell members by eliminating the need for time and cost estimates.

Process Overview:

Drivers present a maintenance card (available in the Enterprise mobile app) at service locations

Shops contact Enterprise's National Service Department (NSD) for any work exceeding preset limits

ASE-certified technicians assess service recommendations based on mileage, history, and cost

Enterprise leverages national account agreements to negotiate pricing and ensure value

The NSD was the first to receive the ASE "Blue Seal of Excellence" and has maintained this recognition for 25 consecutive years, an industry record. Our team includes Master Auto, Double Master Auto, and World Class certified technicians.

Preventative Maintenance

Enterprise follows manufacturer-

			<p>recommended service intervals for each vehicle. Preventative maintenance alerts are:</p> <p>Available to Sourcewell administrators via our customer website                  Pushed directly to drivers via the Enterprise mobile app                  Customizable by administrators for manual notification control</p> <p>Additional alerts include:</p> <p>Maintenance and mileage updates                  Registration status for each unit enrolled in the maintenance program.</p>
<p>95</p>	<p>In addition to the solutions described in 92-94 above, proposers may include a complimentary offering of the following ancillary services:</p> <ul style="list-style-type: none"> <li>i. Short-term rental programs;</li> <li>ii. Upfitting or aftermarket products;</li> <li>iii. Fleet management information technologies, such as: telematics, fleet monitoring, fuel management, fuel tank management, and motor pool/fleet sharing software systems;</li> <li>iv. Roadside assistance including towing, emergency charging, and repairs;</li> <li>v. Vehicle battery longevity monitoring and replacement plans; including installation, operation, and maintenance of dedicated charging and fueling stations.</li> </ul>	<p><input checked="" type="radio"/> Yes  <input type="radio"/> No</p>	<p>Through our Fleet Management programs, we are able to offer all of these services.</p> <p>Enterprise Fleet Management, through its affiliate Enterprise Holdings (Enterprise Rent-A-Car and National Car Rental), provides flexible rental solutions for Sourcewell participants. Rentals can be included in Full Maintenance pricing for seamless access during vehicle service or billed as needed.</p> <p>This ensures minimal disruption and keeps drivers on the road when vehicles are out of service.</p> <p>Equipment Billing, Ownership &amp; Fleet Technologies                  Equipment Billing &amp; Ownership</p> <p>Equipment costs can be billed upfront or capitalized within the lease. Sourcewell entities retain ownership at lease end. Maintenance for equipment is not provided by Enterprise. Reuse or replacement decisions are made by the entity.</p> <p>Fleet Management Technologies                  Enterprise offers advanced tools to enhance fleet efficiency, including:                  Telematics                  Fleet monitoring                  Fuel management systems                  Motor pool and fleet sharing software</p> <p>Fleet Management Technologies and Reporting Tools                  Enterprise provides a robust suite of technology solutions for full visibility and control over fleet operations:                  Customizable Dashboard</p> <p>Offers day-to-day and month-over-month insights                  Fully customizable to meet organizational needs                  Supplements the Annual Client Review with real-time data</p> <p>Mileage &amp; Taxable Fringe Benefit Reporting</p> <p>Drivers can log odometer readings and track personal vs. business mileage                  Reports align with IRS guidelines and support payroll reporting</p>

			<p>Downloadable in multiple formats with built-in guides</p> <p>Integrated Fuel Data</p> <p>Fuel card program (powered by WEX) integrates with dashboard Real-time visibility into fuel usage, costs, and MPG Identifies outliers and helps reduce fuel spend</p> <p>Monthly Vehicle Cost Analysis</p> <p>Compares fleet costs, downtime, resale values, and funding options Identifies opportunities for savings and operational improvements</p> <p>Annual Client Review Tool</p> <p>Delivered by a dedicated Client Strategy Manager Includes year-over-year performance analysis and strategic recommendations</p> <p>Customer Website &amp; Data Tools Enterprise's updated customer portal provides powerful data access and reporting capabilities: Data Visibility</p> <p>Maintenance history License renewals Risk claims Fuel usage via WEX integration</p> <p>Custom Reporting &amp; Management</p> <p>Role-based, self-service reporting Cost allocation by project, region, or vehicle Driver and vehicle history tracking Data export in multiple formats Automated alerts for maintenance, billing, registrations, lease renewals, and recalls Integration with internal accounting systems</p> <p>Mobile App Features Enterprise's mobile app keeps drivers and administrators connected and informed:</p> <p>Real-time alerts for mileage, insurance, license renewals, citations, and maintenance Digital maintenance cards and appointment scheduling Messaging for field communication Status updates on vehicle orders and repairs Oil change reminders and maintenance notifications Map tools for locating fuel stations and service shops Mileage tracking with personal/business categorization Accident reporting with photo upload Click-to-call roadside assistance and Enterprise contacts Multi-vehicle management under one</p>
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			<p>account Pool vehicle check-in/check-out and driver tracking</p> <p>Optional Service Offerings Fuel Card Program (WEX)</p> <p>Accepted at 180,000+ U.S. locations Driver-specific cards for security Controls for product type, merchant access, and exception reporting</p> <p>Exception Monitoring &amp; Fraud Protection Fuel Card Exception Reporting</p> <p>Monitors spend, gallons, purchase timing, and fuel type Custom exception parameters and delivery frequency (daily, weekly, monthly)</p> <p>Fraud Monitoring</p> <p>WEX Fraud Department reviews transactions Detects and alerts on suspicious activity</p> <p>Telematics and GPS Monitoring Enterprise offers Geotab telematics for real-time GPS tracking and analytics:</p> <p>Safety: Accident detection, driver coaching, behavior monitoring Cost Reduction: Lower accident costs, improved claims management Productivity: Route optimization, fuel tracking, workforce utilization Engine Health: Diagnostics, preventative maintenance, reduced downtime Compliance: Accurate HOS and IFTA reporting</p> <p>Enterprise data shows Geotab improves fuel efficiency, service response times, and driver safety.</p> <p>Roadside Assistance &amp; After-Hours Support Enterprise provides 24/7 roadside assistance including towing, emergency charging, and repairs:</p> <p>Drivers can approve repairs up to preset limits via mobile app After-hours service available through preferred vendors Automatic approval for services under preset limits Individual case handling for timely support</p> <p>Battery Longevity &amp; Charging Infrastructure Support</p> <p>Battery replacement included in Full Maintenance program While Enterprise does not install charging stations, it supports planning</p>
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**Exceptions to Terms, Conditions, or Specifications Form**

Only those Proposer Exceptions to Terms, Conditions, or Specifications that have been accepted by Sourcewell have been incorporated into the contract text.

**Documents****Ensure your submission document(s) conforms to the following:**

1. Documents in PDF format are preferred. Documents in Word, Excel, or compatible formats may also be provided.
2. Documents should NOT have a security password, as Sourcewell may not be able to open the file. It is your sole responsibility to ensure that the uploaded document(s) are not either defective, corrupted or blank and that the documents can be opened and viewed by Sourcewell.
3. Sourcewell may reject any response where any document(s) cannot be opened and viewed by Sourcewell.
4. If you need to upload more than one (1) document for a single item, you should combine the documents into one zipped file. If the zipped file contains more than one (1) document, ensure each document is named, in relation to the submission format item responding to. For example, if responding to the Marketing Plan category save the document as "Marketing Plan."
  - [Pricing](#) - Enterprise Pricing Sheet.xlsx - Thursday November 20, 2025 10:41:31
  - [Financial Strength and Stability](#) - enterprise-mobility-fact-sheet\_esgreport-fy25.pdf - Thursday November 20, 2025 11:56:43
  - [Marketing Plan/Samples](#) - Marketing Plan\_Samples.pdf - Thursday November 20, 2025 11:56:52
  - WMBE/MBE/SBE or Related Certificates (optional)
  - [Standard Transaction Document Samples](#) - Agreements.zip - Wednesday November 19, 2025 11:21:36
  - [Requested Exceptions](#) - Sourcewell RFP Master Agreement 04.2026-final redline.docx - Thursday November 20, 2025 10:39:33
  - [Upload Additional Document](#) - Submission and Case Studies.zip - Thursday November 20, 2025 12:00:07

## Addenda, Terms and Conditions

### PROPOSER AFFIDAVIT OF COMPLIANCE

I certify that I am an authorized representative of Proposer and have authority to submit the foregoing Proposal:

1. The Proposer is submitting this Proposal under its full and complete legal name, and the Proposer legally exists in good standing in the jurisdiction of its residence.
2. The Proposer warrants that the information provided in this Proposal is true, correct, and reliable for purposes of evaluation for award.
3. The Proposer certifies that:
  - (1) The prices in this Proposal have been arrived at independently, without, for the purpose of restricting competition, any consultation, communication, or agreement with any other Proposer or competitor relating to-
    - (i) Those prices;
    - (ii) The intention to submit an offer; or
    - (iii) The methods or factors used to calculate the prices offered.
  - (2) The prices in this Proposal have not been and will not be knowingly disclosed by the Proposer, directly or indirectly, to any other Proposer or competitor before award unless otherwise required by law; and
  - (3) No attempt has been made or will be made by Proposer to induce any other concern to submit or not to submit a Proposal for the purpose of restricting competition.
4. To the best of its knowledge and belief, and except as otherwise disclosed in the Proposal, there are no relevant facts or circumstances which could give rise to an organizational conflict of interest. An organizational conflict of interest is created when a current or prospective supplier is unable to render impartial service to Sourcewell due to the supplier's: a. creation of evaluation criteria during performance of a prior agreement which potentially influences future competitive opportunities to its favor; b. access to nonpublic and material information that may provide for a competitive advantage in a later procurement competition; c. impaired objectivity in providing advice to Sourcewell.
5. Proposer will provide to Sourcewell Participating Entities Solutions in accordance with the terms, conditions, and scope of a resulting master agreement.
6. The Proposer possesses, or will possess, all applicable licenses or certifications necessary to deliver Solutions under any resulting master agreement.
7. The Proposer will comply with all applicable provisions of federal, state, and local laws, regulations, rules, and orders.
8. Proposer its employees, agents, and subcontractors are not:
  1. Included on the "Specially Designated Nationals and Blocked Persons" list maintained by the Office of Foreign Assets Control of the United States Department of the Treasury found at: <https://www.treasury.gov/ofac/downloads/sdnlist.pdf>;
  2. Included on the government-wide exclusions lists in the United States System for Award Management found at: <https://sam.gov/SAM/>; or
  3. Presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from programs operated by the State of Minnesota; the United States federal government, as applicable; or any Participating Entity. Vendor certifies and warrants that neither it nor its principals have been convicted of a criminal offense related to the subject matter of this solicitation.

By checking this box I acknowledge that I am bound by the terms of the Proposer's Affidavit, have the legal authority to submit this Proposal on behalf of the Proposer, and that this electronic acknowledgment has the same legal effect, validity, and enforceability as if I had hand signed the Proposal. This signature will not be denied such legal effect, validity, or enforceability solely because an electronic signature or electronic record was used in its formation. - Michelle Rojas, Business Analyst, Enterprise Fleet Management, Inc.

The Proposer declares that there is an actual or potential Conflict of Interest relating to the preparation of its submission, and/or the Proposer foresees an actual or potential Conflict of Interest in performing the obligations contemplated in the solicitation proposal.

Yes  No

The Bidder acknowledges and agrees that the addendum/addenda below form part of the Bid Document.

Check the box in the column "I have reviewed this addendum" below to acknowledge each of the addenda.

File Name	I have reviewed the below addendum and attachments (if applicable)	Pages
<b>Addendum_2_Fleet_Management_Leasing_RFP_112025</b> Fri October 24 2025 04:36 PM	<input checked="" type="checkbox"/>	-
<b>Addendum_1_Fleet_Management_Leasing_RFP_112025</b> Tue October 21 2025 05:07 PM	<input checked="" type="checkbox"/>	2