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Request for Proposals

RFP 100-16

Management of the MBTA's Parking Services

Release Date: September 14, 2016

Pre-Bid Conference:

September 20, 2016, 1:00-2:30 pm EST

MBTA, Conference Room No. 2810, 2nd floor

Ten Park Plaza, Boston, MA 02116

Proposal Responses Due: Friday, October 14, 2016

Table of Contents

Definitions.....	1
1.0 Purpose	4
2.0 Instructions to Respondents: Proposals and Certifications Regarding Eligibility.....	6
2.1 Organization of the Proposal Response	6
2.2 Attachments and Reference Documents/Files	6
2.3 Due Date and Delivery Method.....	7
2.4 Schedule of Procurement Activity	7
2.5 Questions and Clarification	8
2.6 No Public Opening	9
2.7 Late Submissions, Modifications and Withdrawals of Offers	9
2.8 Rejection of Proposals.....	9
2.9 Waiver of Informalities, Deviations, Mistakes and Matters of Form	10
2.10 Cancellation of Solicitation	10
2.11 Acceptance Period.....	10
2.12 Appeal Procedures	10
2.13 Submittals	10
2.14 Contract Term	11
2.15 Pricing and Structure: Performance-Based Pricing.....	12
3.0 Introduction to the MBTA's Parking Services	14
3.1 MBTA's Parking Policy.....	16
3.2 MBTA's Parking Facilities/Inventory.....	16
3.3 Current Parking Payment Systems	17
3.4 Historical Parking Revenues.....	18
3.5 Anticipated Improvements to Increase Revenue and Improve Margin.....	19
3.6 Division of Responsibilities	20
4.0 Scope of Work: General	23
4.1 The MBTA's Parking Services Vision and Long Term Strategy	23
4.2 Startup Plan	24
4.3 Parking Operations Plan	24

4.4 Asset/Inventory Management	27
4.5 Facilities Maintenance Plan	28
4.6 Stormwater Management.....	30
4.7 Environmental Responsibility and Commitment to Sustainability.....	31
4.8 Facilities Expansion/Upgrades	32
4.9 Payments.....	33
4.10 Parking Technology	34
4.11 Annual Audits.....	39
4.12 Reporting	40
4.13 Data Ownership.....	43
4.14 Labor, Training and the Cost of Services.....	44
5.0 General Contract Provisions	44
5.1 Exclusivity.....	44
5.2 Existing Parking Equipment	45
5.3 Licensing and Approval Processes.....	45
5.4 Privacy Policy.....	46
5.5 Right of Entry and Egress and Transportation.....	46
5.6 Assignment of Future Vendor Contracts and Subcontracts.....	46
5.7 Ownership at Contract Expiration.....	47
5.8 End of Contract Transition	47
5.9 Interruptions in the Operation of the MBTA Services.....	47
5.10 General Terms and Conditions	47
6.0 Selection Process	48
6.1 Basis of Award: Best Value Proposal	48
6.2 Evaluation Objectives and Methodology.....	49
6.3 Technical Evaluation Criteria	49
6.4 Technical Proposal Evaluation	51
6.5 WBE/MBE Diversity Program Requirements.....	53
6.6 References.....	54
6.7 Cost/Price Proposal Criteria and Evaluation	54
6.8 Tax Exemption.....	55
6.9 Negotiation Procedures and Best-And-Final Offer	55
6.10 Contract Award.....	55

Definitions

Applicable Law: All federal, state or local statutes, laws ordinances, codes, rules, regulations, policies, standards, executive orders, consent orders, orders and guidance from regulatory agencies, judicial decrees, decisions and judgments, permits, licenses, reporting or other governmental requirements or policies of any kind by which a Party may be bound, then in effect or which come into effect during the time the services are being performed, and any present or future amendments to those Applicable Laws, including those which specifically relate to: the business of the MBTA; the business of Contractor Contractor's subcontractors; the Request for Proposals, the resulting Agreement and the Contract Documents; or the performance of the Services under this Agreement.

Authority: The Massachusetts Bay Transportation Authority.

Booting: Action to immobilize a vehicle through attaching a device to the wheel of a vehicle that renders the vehicle inoperable.

Contract Documents: Including this Request for Proposals, the resulting Agreement and the exhibits, and other documents attached or referenced herein as well as any authorized changes or addenda hereto.

Disability/Disabled Spaces: Parking spaces assigned/allocated to drivers with valid State-issued disability placards/plates.

Electric Vehicle (EV): A vehicle that is propelled by one or more electric motors that use electrical energy stored in rechargeable batteries.

Force Majeure: Means acts of war, domestic and/or international terrorism, civil riots or rebellions, quarantines, embargoes and other similar unusual governmental actions, extraordinary elements of nature or acts of God.

Gross Revenue: Total revenue received prior to allowable deductions.

Hybrid Vehicle: A vehicle using two or more types of power such as a combination of an internal combustion engine and an electric motor. Any vehicle is defined as a hybrid if it uses more than one form of onboard energy to achieve propulsion.

Mobile Parking Payment: Payment of parking fees by wireless device using a payment application.

Net Revenue: Total revenue after allowable deductions.

Parking Program(s): The individual programs used to deliver or enhance the MBTA's parking services.

Parking Services: The MBTA's complete system of parking facilities and parking inventory, including structures and surface lots, and all programs and technologies necessary to provide parking for MBTA customers.

Preferred Parking: Parking spots that are closest to the main entrance or platform of a station or transit facility.

Premium Parking: Valet parking services and reserved parking spaces offered to parkers on a first come, first served basis at a premium price.

Reserved/Dedicated Parking Spaces: Parking spaces allocated to vehicles such as a hybrid or electric vehicle, a shared car, and a vanpool or carpool vehicle.

Smart Parking: A parking management system that assists drivers to find vacant parking spots through the use of technologies.

State of Good Repair (SGR) Scale: The condition rating scale used by the MBTA to

inspect its assets. This rating scale is detailed in **Attachment 7 Sample Asset Management Rubric**.

1.0 Purpose

Carrying an average of 1,340,668 riders every weekday, the Massachusetts Bay Transportation Authority (MBTA) is the largest multimodal transportation agency in the United States providing its riders with eight (8) different modes of travel: commuter rail, heavy rail, light rail, trackless trolley, bus rapid transit, bus, demand responsive paratransit, and ferryboat service.¹ The MBTA serves the Greater Boston, Massachusetts Region, which is the tenth (10th) largest² population center in the United States with a population of 4,552,402.

Through this Request for Proposals the MBTA is seeking the services of an experienced parking management partner that shares the MBTA's vision for deploying technology to more effectively and efficiently manage its 44,000+ space parking inventory to maximize revenues and to enhance the riders' parking experience. With 101 parking facilities, including 10 structured garages and 91 surface lots, the MBTA's parking inventory is one of the largest managed by a public agency. The MBTA has the third largest revenue-generating parking program nationally behind WMATA and BART.

Respondents may submit proposals to provide management services for the MBTA's entire parking inventory, or for a portion thereof. The breakouts include any one or any combination of the following:

- Commuter Rail
- Rapid Transit (Subway, Light Rail, Streetcar, Bus)
- Commuter Ferry
- Surface Lots
- Structured Garages

¹ Federal Transit Administration-National Transit Database 2014

² US Census 2010

Respondents must identify what portion(s) of the parking inventory they are bidding on. Additionally, Respondents should note that the MBTA desires to provide a completely seamless experience for its customers and in administering this contract. In the event more than one contract results from this RFP process, the contractors will be required to work collaboratively to provide a working plan to ensure integrated operations.

2.0 Instructions to Respondents: Proposals and Certifications Regarding Eligibility

As part of its Proposal, each Respondent must furnish all of the information requested in Section 2.

2.1 Organization of the Proposal Response

The Proposal shall be bound and tabbed with no more than one hundred twenty-five (125) double-sided pages of text, charts, attachments, etc. Respondents must submit five (5) hard copies with one marked as the original, and one (1) digital PDF copy on a USB flash drive. The Pricing Proposal must be submitted separately in a sealed envelope, clearly marked, and as an Excel file on a separate USB drive.

The proposal shall be organized as follows:

- Technical Proposal
 - Introduction/Background
 - Key Qualifications/Past Experience/References
 - Startup Plan
 - Parking Operations Plan
 - Facilities Maintenance Plan
 - M/WBE Participation
 - Statements and Certifications (forms)
- Pricing Proposal (separately in a sealed envelope; digital Excel file must also be submitted on a separate USB drive)

2.2 Attachments and Reference Documents/Files

The attachments and reference files listed below are located on the MBTA's Business Center Site accessed through this link:

https://www.mbta.com/business_center/bidding_solicitations/materials_management/invitation_for_bids/Default.asp

- Attachment 1 Price Proposal
- Attachment 2 Statements and Certifications Forms
- Attachment 3 General Terms and Conditions
- Attachment 4 Sample KPI Index and Contractor Report Card
- Attachment 5 Parking Facilities Master Inventory
- Attachment 6 Parking Facilities Conditions
- Attachment 7 Sample Asset Management Rubric
- Attachment 8 Stormwater & Wastewater Handbook
- Attachment 9 AUL Requirements by Site
- Attachment 10 Lighting System Directive
- Attachment 11 Desman Study

2.3 Due Date and Delivery Method

Sealed proposals are due on Friday, October 14, 2016 at the Procurement & Logistics Department, Room 2810, Ten Park Plaza, Boston, MA 02116, no later than 12:00 noon EST for the work described herein. Please mark the outside of the package with RFP #100-16. Please ensure that your firm's Pricing Proposal Form is in a sealed envelope separate from the Technical Proposal and included as an Excel file on a separate USB drive.

2.4 Schedule of Procurement Activity

Activity	Date
RFP Release Date	September 14, 2016
RFP Pre-Bid Conference	September 20, 2016
Respondent Deadline to Submit Questions on the Content of the RFP	September 28, 2016

Respondent Questions to RFP Answered by Close of Business	October 5, 2016
Deadline for Submission of Proposals @ 12:00 Noon Eastern ("Due Date")	October 14, 2016
Proposal Evaluation and Interviews (estimated)	Week of October 17, 2016
Final Selection (estimated)	November 4, 2016

2.5 Questions and Clarification

Any questions about, request for clarification to, or requests for relief from, the requirements of this RFP must be submitted by email, and received by the MBTA before 5:00pm EST on September 28, 2016. Please email your questions to Joseph Harney, Contracting Officer, at **JHarney@mbta.com**. Please use only this email address for questions. Include "RFP #100-16 Question" in the subject line. Improperly addressed emails may not receive proper and timely attention.

All questions and the MBTA answers will be posted on the MBTA website provided below per the schedule above. Should the MBTA make changes to any specification, stipulation, requirement, or procedure, notification will be made to all Respondents in the form of written Addenda. No officer, agent, or employee of the MBTA is authorized to amend any provision contained in this RFP, including the specifications, unless such amendment is issued as an Addendum and posted on the MBTA website.

MBTA website:

https://www.mbta.com/business_center/bidding_solicitations/materials_management/invitation_for_bids/Default.asp

Interested vendors should not contact any other employee, Selection Committee member, member of the Board of Directors, or agent of the MBTA concerning the subject matter of the Request for Proposal or related matters. Any Respondents contacting any such person shall be disqualified.

2.6 No Public Opening

There will be no public opening of this RFP. The Technical Proposals will be opened in the presence of MBTA witnesses by the Contracting Officer (or designee). After the Technical Proposals Evaluations are completed, the Contracting Officer (or designee), in the presence of the MBTA's General Counsel (or designee) opens the Pricing Proposals.

2.7 Late Submissions, Modifications and Withdrawals of Offers

Any offer received at the Procurement & Logistics Department after the exact time specified for receipt will not be considered unless:

- Package was sent by registered or certified U.S. mail not later than the fifth (5th) calendar day before the Due Date; or
- Package was sent by mail, or other method authorized by the MBTA (e.g., facsimile) and the late receipt was due solely to the mishandling of the package by the MBTA after receipt; or
- It is the only offer received by the MBTA.

Proposals may be withdrawn by written notice to the MBTA, or in person by the Respondent or an authorized representative of the Respondent at any time before the award (i.e., the point at which the MBTA formally approves the award).

2.8 Rejection of Proposals

The MBTA reserves the right to reject any and all proposals, in whole or in part, if such action is determined to be in the best interests of the MBTA.

2.9 Waiver of Informalities, Deviations, Mistakes and Matters of Form

The MBTA reserves the right to waive any informalities, deviations, mistakes, and matters of form rather than substance of the proposal documents. No officer or agent of the MBTA is authorized to waive this reservation.

2.10 Cancellation of Solicitation

The MBTA reserves the right to cancel this solicitation at any time prior to execution of an agreement by all parties and without any liability against the MBTA.

2.11 Acceptance Period

The MBTA requires a minimum Acceptance Period of one hundred eighty (180) calendar days. "Acceptance Period," for purposes of this solicitation, means the number of calendar days available to the MBTA for awarding a contract based on the Due Date specified in this solicitation for receipt of proposals.

2.12 Appeal Procedures

Bid appeals or protests relative to this procurement will be reviewed and adjudicated in accordance with the MBTA's Appeals/Protest Procedure - Goods & Services. A copy of this procedure is available by contacting the MBTA Procurement & Logistics Department, Room 2810, Ten Park Plaza, Boston, MA 02116.

2.13 Submittals

Pursuant to this RFP, Respondents are required to comply with the terms and conditions stated herein in order to be deemed responsive and responsible. Respondent must address all terms, conditions, and concerns listed in this RFP and

describe how it plans to complete the work effort such that the MBTA's requirements are fully met.

All Respondents must acknowledge that they have read and understand the series of Statements and Certifications located on the MBTA's Business Center Site labeled **Attachment 2 Statements and Certifications Forms**. Respondents must complete, sign, and submit the **Acknowledgement Form on page 1** and the **Acknowledgement of Addenda Form on page 2** of the Statements and Certifications Forms with their Proposal. No other Statements and Certifications Forms are required for submittal of a Proposal.

Respondents shall not: (1) leave any section of a form blank; (2) mark any section of a form not applicable (N/A); (3) make reference to other documents; or (4) make any response conditional. The MBTA reserves the right to request additional information for clarification purposes, either written or oral, from Respondent prior to award.

If a proposal does not meet all of the requirements listed in the RFP, the Respondent's proposal may be disqualified. Failure by the Respondent to examine all information pertaining to this solicitation or participate in an on-site visit, if scheduled by the MBTA, will be at the Respondent's risk. The MBTA reserves the right to request additional information of each Respondent in order to clarify documentation submitted in response to the Request for Proposals.

2.14 Contract Term

The MBTA intends to negotiate a five-year initial agreement with two five-year term extensions based upon the performance of the selected Respondent. The MBTA will have the sole option to exercise one or more of the extensions based upon the performance of the Respondent in these areas:

1. MBTA Revenue Maximization

2. Improved Customer Experience
3. MBTA Technology Deployment

2.15 Pricing and Structure: Performance-Based Pricing

The MBTA seeks to enter into a performance-based agreement for the management of its parking services rather than a traditional administrative cost reimbursement agreement. The levels of compensation paid to the successful Respondent will be a combination of an agreed-upon Administrative Fee and the achievement of quantitative and qualitative performance indicators.

The MBTA wishes to deploy technologies that will both reduce the cost of administering its parking inventory and enable top line revenue growth. Those technologies, detailed in this Request for Proposals, will reduce the need for staff and increase the efficiency of managing the MBTA's parking inventory.

Administrative Fee

The selected Respondent will be paid an Administrative Fee, the cost of administering the MBTA's parking structures and facilities. That Fee will be reflective of the reduced cost of administering the MBTA's parking services that results from the implementation of the smart parking technologies to be deployed during the initial term of the contract.

Performance Bonus and Key Performance Indicators

The MBTA strongly advocates performance incentives as a significant portion of the selected Respondent's compensation. The MBTA will measure the performance of the Contractor monthly, according to the *Contractor Report Card* (sample located in Attachment 4), to determine the Contractor's eligibility to receive performance bonuses. The MBTA will set an average Performance Threshold Score at the beginning of each year that must be achieved across all Performance Metrics by the Contractor.

The Contractor will receive only the base level of compensation in the Administrative Fee if the Contractor's performance in any discrete Performance Metric is below the minimum threshold for that metric even if the overall average of the Contractor's performance is above the average Performance Threshold score. Additionally, the Contractor will not receive more than the base level of compensation if warning notices are levied for non-compliance with performance requirements and MBTA directives.

The MBTA will pay performance bonuses to the Contractor based upon the evaluation of the Contractor's performance. Those bonus payments will be set by the MBTA as a percentage of the annual net parking revenues not to exceed 5.00% of the annual contract value on an annual basis, or not more than \$2,000,000, whichever is less.

The selected Respondent's performance will be measured according to these key performance indicators:

Quantitative	Qualitative
Revenue Increases	Rider Satisfaction-Surveys
Occupancy Rates/Turnover	Parking Mgmt. Strategies
Deployment of Technology	Cooperation with the MBTA
Reductions in Administrative Cost	Enhancements to the Parking Infrastructure

The Respondent is required to submit the Pricing Proposal separately from the Technical Proposal. The Pricing Proposal should be submitted in a sealed envelope clearly labeled as Pricing Proposal with one (1) digital Excel file version on a separate USB drive. **Attachment 1 Price Proposal** contains instructions and the required forms. The Pricing Proposal shall include three (3) parts:

1. The cost of providing the services included in the Scope of Work, Section 4.0 of this Request for Proposals, with the understanding that the technologies suggested by the MBTA will be deployed during the first term of the agreement;

2. A thorough explanation of the cost for the smart parking management technologies suggested by the MBTA as well as other technologies recommended by the Respondent.
3. The Respondent's estimate of how MBTA parking revenues would be increased by the deployment of technology and the Respondent's proposed management techniques and strategies.

3.0 Introduction to the MBTA's Parking Services

Through this Request for Proposals, the MBTA is seeking to establish a business partnership with a firm that will effectively and efficiently manage the MBTA's parking services by deploying industry best practices and smart parking technology. Parking at MBTA facilities is a critical part of the overall rider experience, and the MBTA wishes to deploy innovative technologies, structures, and services that enhance the rider experience as well as enable the MBTA to manage its parking inventory to maximize return in revenue and customer satisfaction.

The MBTA issued a Request for Information (RFI) in April 2016 and the responses to that RFI were influential in the development of this Request for Proposals (RFP). The RFI responses presented the MBTA with ideas for new technology enhancements, proven parking management strategies, and innovative services that will facilitate the vision the MBTA has for its parking program.

The MBTA is seeking a partner that will work collaboratively with the MBTA through a Performance Based Agreement that rewards the chosen Respondent with a higher level of compensation based upon increased total revenue, the use of smart parking technologies, and customer satisfaction.

In particular, smart parking solutions have proven to better manage parking inventory, improving efficiency and revenue across a range of applications. The MBTA has adopted some advanced payment technologies, including mobile payments, and seeks

to expand such offerings at its facilities, establishing the MBTA as a leading adopter of technologies that reduce operating cost and improve the quality of the customer experience. It is the intention of the MBTA to create consistent payment options throughout its facilities by expanding these or similarly convenient options for riders to all facilities over the term of the agreement that results from this RFP.

The focus of this RFP is to enhance the MBTA's parking system revenues and to improve the experience for its customers. To that end, deployment of wayfinding and digital sign systems that work in unison with a smart parking backend to identify vacant parking spaces and to direct riders to those spaces is desirable. The MBTA is confident that these new technologies will also reduce the cost of enforcement while affording the MBTA the potential to offer premium-priced priority parking and similar concepts.

In general, the MBTA is seeking a partner that will work collaboratively to develop a new approach to how the MBTA manages its parking services. The MBTA believes that a new approach to parking management should be accompanied by a new approach to compensating the Parking Management Contractor in which the Contractor shares a commensurate portion of what will be increasing parking revenues.

The MBTA continues to expand its services throughout Massachusetts with expanded service on the Framingham/Worcester Commuter Rail Line, Cape Flyer seasonal service to Cape Cod, and an extension to the Green Line. Since 2000, the MBTA's ridership has grown at a pace that is twice as fast as the region's population growth.³ That rate of growth is the highest of any urban area in the top ten transit cities in the United States.⁴

³ MBTA Internal Statistics

⁴ National Transit Database 2015 Reporting

MBTA internal forecasts conservatively estimate that total system ridership will grow from 409,248,438⁵ to 500,000,000 annual rides by 2021.⁶ And with a significant number of the MBTA's parking facilities (47) at 85% capacity or greater on an average weekday, distributing demand over the available parking supply through use of mobile parking applications and parking guidance systems is a major MBTA focus. It is crucial, therefore, that the MBTA upgrade the management of its parking services.

3.1 MBTA's Parking Policy

The availability of parking is a significant influence on the use of transit service. For MBTA's Commuter Rail, Subway and Light Rail services, the availability of parking is crucial to keeping ridership high as riders in some of the areas service by these modes do not have convenient 'first mile last mile' options to access service. Parking is a service that frequently requires enforcement based upon policy and law.

The Commonwealth of Massachusetts' Regulation 703 CMR 2.00 details the issuance and enforcement powers provided to the MBTA and its designated Contractor. This regulation is available through the following link:

http://www.mbta.com/uploadedfiles/Riding_the_T/Parking/Parking%20Regs%20Post%20Hearing.pdf

3.2 MBTA's Parking Facilities/Inventory

The MBTA has 107 parking facilities serving MBTA stations and terminals. The MBTA operates and controls the pricing at 101 of these facilities; the other six (6) are operated by a town or regional transit MBTA partner and partially controlled by the MBTA. There are an additional 47 parking facilities that serve MBTA riders; however, the MBTA does not operate, nor does it earn any revenue from these facilities.

⁵ National Transit Database 2014 Audited Report

⁶ Fiscal Management and Control Board-MBTA Ridership-11/18/2015

The management of the 101 facilities fully operated by the MBTA is part of this agreement; however, the MBTA is negotiating with its town or regional transit authority partners to include those facilities in the responsibilities of the successful Respondent.

A complete inventory of all parking facilities serving the MBTA is located on the MBTA Site as **Attachment 5 Parking Facilities Master Inventory**. Please note that the accuracy of the number of actual parking spaces has been affected by construction over time. The MBTA maintains a Parking Facilities Condition File as part of its Asset Management Program. This file is also located on the MBTA Site as **Attachment 6 Parking Facilities Conditions**.

3.3 Current Parking Payment Systems

An inventory of payment options by garage is included in **Attachment 5 Parking Facilities Master Inventory** on the MBTA Site. The MBTA currently provides three simple parking payment options:

1. **Daily Payment:** Daily parking fees range from \$4 to \$7 depending upon the type of facility. Payment can be made using the PayByPhone payment system at all surface parking facilities; cash and credit at garages and attended facilities. Additional fees apply to vehicles that stay beyond the 14-hour limit over a 24-hour period.
2. **Monthly Permit:** Frequent commuters can purchase a monthly parking permit. Monthly permits are discounted by \$20 to \$30 from daily payments at unattended facilities. At Braintree, Quincy Adams and Oak Grove, the MBTA offers a Premium Monthly Permit because of the high demand for parking spaces at these facilities. Premium spaces are reserved 24 hours a day, seven days a week and are located in a preferred parking area near to the station entrance.

3. Monthly Invoice Notice: For every day a vehicle is identified as unpaid, the owner of the vehicle will be issued an Invoice Notice at the end of the month. That payment will include the daily payment rate for that facility and a 50-cent surcharge per day for administration. Those receiving a Monthly Invoice have 30 calendar days from the invoice date to pay the current month's invoice without incurring additional fees and penalties.

3.4 Historical Parking Revenues

Parking revenues at public transit stations and facilities is directly a result of service frequency and service quality. The MBTA is keenly aware that the level of services it provides as well as the quality of those services will impact parking revenues. The following chart reflects MBTA parking revenues over the past eight years. Impacting revenues for the MBTA is the \$15.4 million per year securitization payment for parking revenue anticipation bonds issued by the MBTA.

MBTA Historical Revenues*	
Fiscal Year	Gross Revenue
2009	\$36,227,195
2010	\$38,456,315
2011	\$39,429,451
2012	\$40,693,433
2013	\$42,379,514
2014	\$45,133,968
2015	\$44,858,531
2016	\$47,950,094

**Gross Revenue figures include enforcement revenue, and income from third party programs and management agreements.*

3.5 Anticipated Improvements to Increase Revenue and Improve Margin

The MBTA is investing in its infrastructure to respond to increasing demand for transit service. This investment includes enhancing the parking experience for its riders.

The MBTA will be making significant capital investments in parking facilities in the near future, primarily upgrades to existing structured parking facilities. The Respondents to this RFP are being requested to make complementary improvements to the following:

- Facilities: Improving the existing inventory of structured and surface parking spaces to maximize use and inventory.
- Payment: Expanding payment options to minimize or eliminate the use of cash as a form of payment.
- Products: Explore the expansion of preferred and premium parking options, especially at parking facilities operating at 85% capacity.
- Enforcement: Reduce enforcement costs by relying upon technology to enforce parking payment.
- Parking Environment: Introduce services and amenities that enhance the experience for riders using the MBTA's parking facilities.

The MBTA is sincere in its commitment to a partnership with the successful Respondent to create a parking experience that achieves the MBTA's goals for its parking system while providing a healthy financial return for the Contractor.

3.6 Division of Responsibilities

The following chart depicts general responsibilities between the Contractor and the MBTA.

	Contractor	Shared	MBTA
Parking Policies			X
Enforcement		X	
Pricing Engine/Propose Pricing	X		
Approve Pricing			X
Smart Technology		X	
Facilities Maintenance		X	
Parking Data Analytics			X
Demand Management			X
Preferred and Premium Services	X		
Special Event Parking Services	X		
Facilities Enhancements	X		
Asset/Inventory Management		X	
Workforce Management	X		
Plans (Startup, Parking Ops, Facilities Maint.)	X		
Plan Approvals			X
Sustainability		X	
ADA Compliance		X	
Payments		X	
Customer Service/Support		X	
Audits			X

Marketing		X	
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4.0 Scope of Work: General

4.1 The MBTA's Parking Services Vision and Long Term Strategy

The MBTA has three guiding goals for its parking services:

Delivery to Service: The MBTA's parking network delivers thousands of commuters to our Commuter Rail, Rapid Transit, and Commuter Ferry services each day. Failure of any point in the parking system will have a domino effect across the transit system.

Revenue Generation: The MBTA is required by statute to maximize "non-transportation revenues from all sources" and "implement policies that increase the proportion of the authority's expenses covered by system revenues" (M.G.L. ch.161A §11). The parking system contributes millions of dollars to the MBTA's bottom line each year, and continuing to grow parking revenues is a key component of the MBTA's overall revenue strategy.

Safety and Customer Satisfaction: The MBTA's parking garages and lots are also the system's first and last touchpoint for many commuters. Our customers deserve, at the most basic level, to park in facilities that are well managed, safe, and in good physical condition. Preferably, our parking lots should be additive to the customer experience, and make it easier for customers to access the system.

The MBTA is in the process of developing a long-term strategy for its parking program, and the successful Respondent will be a key partner in developing and implementing this vision.

The successful Respondent will assume responsibility for oversight and management of the vendors currently providing services for the MBTA's parking program. These include PayByPhone, a mobile payment provider, and Complus Data, provider of violation Invoice fees management. The successful Respondent will work with existing vendors of parking payment and enforcement services until they are able to implement

long term, technology-based solutions. All vendors and/or subcontractors hired by the successful Respondent will be subject to MBTA approval.

4.2 Startup Plan

The Respondent shall provide to the MBTA a Startup Plan that details how the day-to-day operations of the parking services and management of vendors will be assumed and initiated. The Startup Plan shall detail the following requirements, but not be limited to:

- A description of how the Respondent will ensure services begin on the contract commencement date.
- The proposed startup activities with a specific timetable in the form of a Gantt chart, including timelines for the completion of specific tasks.

Additionally, at the commencement of the term of the agreement resulting from this RFP, and at the direction of the MBTA, the successful Respondent shall re-key all appropriate locks at each facility. The MBTA shall be provided with copies of all keys.

4.3 Parking Operations Plan

The Respondent shall provide to the MBTA a Parking Operations Plan that details how all aspects of the day-to-day operations of the parking services and management of parking assets will be accomplished, including reporting of activities to the MBTA. Further, it should detail how it will manage the MBTA's current parking program vendors, as well as any subcontractors and/or third party vendors.

The Respondent shall refer to the MBTA's Design Guidelines in preparing its Parking Operations Plan. MBTA's Design Standard Documents are available through this link:

http://www.mbta.com/business_center/bidding_solicitations/design_and_construction/?id=22046&title=MBTA%20Contract%20Guidelines

The key elements of the Respondent's Parking Operations Plan shall include detail for the following services and responsibilities:

- Management and Operation of Structured and Surface Parking Facilities: The inventory of the MBTA's facilities is located on the MBTA Site. The Respondent shall include an organizational chart that details tiers of supervision and the percentage of time each individual in a supervisory role will dedicate to the MBTA's facilities. A full-time manager(s) shall be assigned to the facilities.
- Parking Facilities Inventory Management: An initial inventory assessment service is detailed in the next section, 4.4 Asset/Inventory Management. The Respondent shall demonstrate in its plan its proposed methodology for ongoing reporting of inventory.
- Staffing: The Respondent shall detail a staffing plan to effectively manage and operate all facilities and programs including enforcement. Given the MBTA's goal of enhancing the customer experience, the Respondent must demonstrate controls and procedures to ensure its employees to render a high degree of courteous service to the public and parking customers. This includes conduct, demeanor, appearance, and supervision to maintain a high standard of service through adequate education and training, background checks, drug and alcohol testing, and regular performance reviews. The Respondent shall include a proposed schedule for hourly positions that includes title and location. The MBTA reserves the right to direct the selected Respondent to remove any member of its project team or any employee. Respondents are not required or bound to retain any of the current Contractor's employees.
- Customer Service and Support: The Respondent shall describe how it intends to deliver superior customer service at the facilities and support MBTA customer communications. Respondents shall refer to the MBTA's Customer Bill of Rights located on the MBTA Site:

http://www.mbta.com/customer_support/customer_bill_of_rights/

The MBTA has a designated number for Customer Support Representatives, which will be the single contact for customer service inquiries by phone. Email

inquiries will also be directed to the MBTA Customer Support Center. All customer service information should be displayed or referred to as these, whether on site in the facilities, online or within mobile applications.

- Marketing: The Respondent shall demonstrate its ability to achieve the MBTA's goals of maximizing revenue, increasing utilization rates at under-utilized facilities, and enhancing the customer experience by marketing the parking services. Marketing services should encompass different mediums and methods relevant to the MBTA's customers and other regional travelers who are potential customers. The selected Respondent shall not promote the use of other parking structures and facilities that it manages over those of the MBTA.
- Revenue Control: The Respondent shall demonstrate a manner of operations that ensure maximum daily revenue collection, ensuring safe and secure collection of revenues and precise reporting. This includes on-site inspections of attended and unattended systems, enforcement and auditing practices.
- Revenue Audits: The Respondent shall describe its auditing practices, including a schedule of audits and reporting practices.
- Parking Enforcement: The Respondent shall detail in its plan how, in accordance with the MBTA's Parking Policy, it will ensure the proper parking fees are collected, work with MBTA police to remediate improperly parked vehicles, and report issues and incidents to MBTA and/or local police. The Respondent shall also detail its capacity for and methods of collecting fines. This is a particular area that the MBTA believes can be administered through technology to alleviate overdue payments and high overhead costs.
- Safety and Security: The Respondent shall also describe and demonstrate its ability to patrol all facilities to ensure a safe and secure environment for riders, customers, and employees. This includes identification of employees and control of entry and/or exit to MBTA facilities, responding to alarm conditions, responding to and documenting all incidents, and following incidents to their conclusion.
- Parking Programs: The Respondent shall demonstrate its ability to manage and oversee multiple vendors and program offerings, and describe a single

reporting interface/dashboard. The Respondent will be expected to integrate its reporting to the specifications of the MBTA's internal operations platform. Currently, data reporting should be in Comma Separated Value (CSV) format and automatically imported to an FTP site designated by the MBTA.

- Preferred and Premium Parking Program: The MBTA wishes to expand its parking offerings by providing preferred parking spaces and premium parking services at facilities where adding these services would yield economic benefits.
- Ensure Accessibility for Customers with Disabilities: The Respondent shall demonstrate its ability to fully comply with the requirements of the Americans with Disabilities Act (ADA), considering all access features, such as elevators, push-button door openers, audio features for pay machines, and accessibility for mobile payments. The Respondent shall outline its plan to ensure 100% availability of all ADA parking spaces at all times for permitted parkers, especially during snow and construction events. The Respondent shall also describe how it will coordinate with the MBTA's Department of System-Wide Accessibility to ensure options throughout the entire parking services are accessible to customers with disabilities.
- Coordination with the MBTA, Municipalities, and Other Contractors: The Respondent shall describe how it will communicate and coordinate with the MBTA, its town or regional transit MBTA partners, and other MBTA contractors, such as Keolis, its current contractor for Commuter Rail service.

4.4 Asset/Inventory Management

The Respondent shall include with its Proposal a strategy to complete an initial inventory and condition assessment of all parking facilities, as well as a proposed method of reporting inventory and conditions in real time. The condition assessment should be performed using the State of Good Repair (SGR) database scale of 1-5 and include the approximate age and remaining lifecycle of each asset. **Attachment 7 Sample Asset Management Rubric** is provided on the MBTA Site to provide an

illustrative example. The cost for the initial assessment should be provided in the price proposal as a line item.

The inventory and condition assessment and ongoing reporting must detail, at a minimum, the following:

- Disability spaces (Standard and EV or Hybrid)
- Electric Vehicle (EV) charging stations
- Hybrid Vehicle spaces
- Premium Parking Services
- Preferred Parking Spaces (In addition to disabled, EV and Hybrid spaces)
- Car Share spaces
- Attended facilities
- Unattended facilities
- Payment options & hardware for each facility
- Physical Facilities Assessment (Structure, electrical, pavement, lighting, etc.)
- Parking Equipment

Please refer to section 4.10 Parking Technology for detailed information regarding Asset/Inventory Management reporting system requirements.

4.5 Facilities Maintenance Plan

The Respondent, in its proposal, shall detail a Facilities Maintenance Plan that includes, but is not limited to, the following responsibilities:

- Accessibility
- Lighting
- Parking equipment
- Sign systems
- Electrical equipment

- Technology equipment and systems
- HVAC
- Maintenance tools, equipment and supplies
- Cleaning/disinfecting of passageways, stairwells, elevators, booths, etc.
- Cleaning of stalls and space
- Cleaning/Removal of oil and grease
- Use of Environmental Protection Agency (EPA) designated Green Seal products
- Trash removal
- Landscaping
- Snow plowing/clearing
- Stormwater management and drainage
- Environmental management
- Emergency management
- Preventative maintenance
- Parking Facility Inspections
- Repairs
- Testing (fire alarms, pumps, oil/water separators, etc.)
- Sweeping, Restriping and Renumbering
- Monitoring of subcontractors and vendors
- Reporting

The successful Respondent shall keep the facilities clean and in good repair and operational at all times through a well-managed Facilities Maintenance Plan. Of particular importance is the responsibility of selected Respondent to provide snow plowing and clearing services during the Winter Season. Within thirty (30) days of the commencement of the term of the agreement resulting from this RFP, the successful Respondent shall provide the MBTA with a facilities condition statement for all facilities and assets.

All condition assessments should be performed using the State of Good Repair (SGR) database scale of 1-5 and include the approximate age and remaining lifecycle of each

asset. **Attachment 7 Sample Asset Management Rubric** is provided on the MBTA Site to provide an illustrative example.

The successful Respondent shall be responsible for any repairs to the facilities and assets that are the result of negligence or abuse by the Respondent, its employees, or its agents. If the MBTA makes said repairs, the cost of the same shall be deducted from the compensation due to the successful Respondent under the resulting agreement.

At all times, parking equipment and signage are the property of the MBTA. Equipment shall be used as prescribed by the manufacturer's instructions and shall be maintained and kept in good usable condition, including performing preventative maintenance.

At a minimum, equipment malfunctions and repair needs shall be reported to the MBTA daily as required in section 4.12 Reporting.

The MBTA reserves the right to require the successful Respondent to add, remove or change parking equipment and signage.

4.6 Stormwater Management

Stormwater is a regulated issue, and the quality of stormwater draining off of the MBTA's parking facilities is a particular concern to the MBTA. All facilities have drainage systems that convey stormwater to an off-site system. The Respondent shall include with its Proposal a strategy to complete an initial inventory assessment of all stormwater drains within all parking facilities. The cost for the initial assessment should be provided in the price proposal as a line item.

The inventory assessment must detail the following:

- Quantity per facility

- Locations (Geocoded) within facility
- Associated outfalls
- Current condition

As part of the Facilities Maintenance Plan, the Respondent will demonstrate how it will ensure that catch basins and outfalls are properly maintained to be clear of debris, especially during rainfall and snow operations.

The MBTA **Stormwater & Wastewater Handbook** is located on the MBTA Site as **Attachment 8**.

4.7 Environmental Responsibility and Commitment to Sustainability

The Respondent shall demonstrate throughout its Proposal its understanding of the importance of environmental responsibility, as well as its commitment to sustainability. The Respondent should present a plan that details its ability to implement energy efficient and environmentally sensitive programs in parking management.

Much of the MBTA's land are the sites of known contamination, and their clean up and maintenance are regulated by the Massachusetts Contingency Plan (MCP). The MCP allows the property owner to leave some contaminated soils on the property if there is no exposure to humans or to the environment, and an adequate barrier, such as a parking lot, is in place to prevent exposure. In such a case, an Activities in Use Limitation (AUL) is placed on the site. The AUL contains a series of requirements for how the property can be used and how it will be maintained. The primary requirement for MBTA parking lots with AULs is that the parking lots are visually inspected to ensure that the pavement is intact and not breaking up. A table listing the requirements for each AUL site and the semi-annual reporting forms are located on the MBTA Site as **Attachment 9 AUL Requirements by Site**.

The MBTA will require the successful Respondent to maintain parking lots with AULs to those specifications. In the event of non-compliance, the Contractor will be responsible for all associated fines and remediation expenses.

At a minimum the Respondent's Sustainability Plan should address the following activities:

- Recycling, Reuse and Repurposing
- Sustainable Purchasing
- Proactive Facilities Maintenance
- Sustainable Cleaning Procedures
- Construction Waste Management
- Asset/Inventory Management
- Programs to Effectively Manage the Inventory
- Use of Parking Guidance Systems/Wayfinding
- Lifecycle Assessments
- Promotion of Car and Bicycle Sharing
- EV Charging and Preferential Access for EV and Hybrid Vehicles
- High Efficiency HVAC and Lighting Systems
- Stormwater Management
- Use of Renewable Energy Sources

4.8 Facilities Expansion/Upgrades

It is likely that the MBTA will be issuing another Request for Proposals for capital improvements to its existing parking structures and surface lots. Respondents should suggest a short-term facilities expansion and upgrade plan that would improve the parking environment up to a maximum capital expense of \$1 million per fiscal year. Respondents may, at their discretion, suggest additional alternative expansion and upgrade plans exceeding this amount.

As a result of operating requirements and the Respondent's upgrade plan, the MBTA may request a change to the scope of the successful Respondent's responsibilities. This may include expansions and/or upgrades at facilities, or the requirement to discontinue services at an existing facility. If the change or amendment will result in an increase or reduction in costs, an equitable adjustment to the Price shall be negotiated. Capital improvements requested of the selected Respondent will not exceed \$1 million.

4.9 Payments

The MBTA's goal for the payment of parking fees is to eliminate the use of cash, and to promote the use of mobile and other emerging forms of payments that the MBTA may adopt for its transit services and programs.

The MBTA is in the process of upgrading its Automated Fare Collection (AFC) system. While the procurement has yet to be completed, it will be specified as an account-based smart-card system with open-payments capability, and API access for third-party applications. While all logic and calculation to determine the amount to charge a customer for parking will reside in the successful respondent's Pricing Engine (see section 4.10 below), MBTA customers must be able to pay for parking in MBTA lots using the new AFC system, which entails the respondent's payment system being able to deduct value from a customer's account in the AFC system. Additionally, the payment system must support passive billing of a customer's AFC account via license plate recognition if the customer has chosen to associate their license plate with their AFC account. The AFC system is being specified with APIs that will allow this type of third party integration, and the selected respondent will be responsible for developing and maintaining its payment system's integration with the MBTA's AFC system.

The MBTA currently has a mix of pay-on-foot multi-space pay stations, mobile payments, and manned booths for collection of parking fees. Maintenance of these legacy payment devices will be required until the technologies proposed in this plan

are deployed. Oversight of the mobile payments vendors and the parking ticket management system provider will become the responsibility of the successful Respondent. The MBTA has existing contractual agreements with PayByPhone for a cashless parking payment solution, and Complus for the collection and management of parking Invoice fees. The contract with PayByPhone ends on January 1, 2017, and the Complus contract ends on January 31, 2017.

The MBTA is committed to ensuring the availability of all programs and services for its customers with disabilities. To that end, these key actions should be taken to ensure accessibility of payment:

- Mobile app must be compliant with WCAAG 2.0 AA standards.
- As part of the initial inventory, assess if pay by foot options are located in accessible locations.
- Recognizing that some customers may be unable to use even a fully accessible pay by foot machine, and that not everyone has mobile app, establish a clear process for paying by monthly invoice with no surcharge for those who can demonstrate disability was reason for non-payment.

The selected Respondent will ensure that all payment devices and systems accept the EMV (Europay, MasterCard, Visa) payment standards. The payment devices and systems must also accept MasterCard and Visa branded Transit Benefit stored value cards that are issued by Wageworks, EdenRed, and other Third Party Administrators (TPAs). The MBTA will require the selected Respondent to use the MBTA's payment processor or absorb the processing costs of any other vendor.

A listing of payment options by garage is located on the MBTA Site. Respondents should refer to section 4.10 Parking Technology for detailed information regarding additional payment technology requirements.

4.10 Parking Technology

The MBTA considers parking an important part of the customer experience for those who access its facilities by car. The MBTA will continue to improve its infrastructure by embracing technological advancements, parking facilities included, to allow for a seamless customer experience from the time the rider enters a parking facility until they return to their vehicle and depart. The parking management technology required by the MBTA continues the agency's commitment to improving every facet of its operations.

The MBTA will not dictate a specific technological solution, but rather will allow Respondents to propose to minimum technological requirements and performance standards. The MBTA strongly advocates open source platforms and cost-effective solutions. The central system must be able to interface with other existing MBTA platforms for asset management, reporting, revenue control and payments.

In particular, the system proposed by the Respondent must be capable of interfacing with a new Automated Fare Collection (AFC) system now being procured through a similar, performance-based Request for Proposals. See section 4.9 for details.

The Respondent shall present a proposed cost or Capital Expense for the technologies proposed in response to these technical requirements. The MBTA reserves the right to either accept the CAPEX and have the selected Respondent purchase, install and maintain the technology, or the MBTA may choose to purchase the technologies and have the selected Respondent install and maintain the equipment and system.

System Description

The MBTA wishes to work with its parking partner to build an advanced parking administration and revenue collection system that deploys the most proven and reliable smart parking technologies that will achieve the following goals:

- Provide real time parking availability guidance to MBTA customers via mobile application and dynamic wayfinding.

- Allow for mobile and other forms of electronic payment for parking using wireless devices, contactless credit and debit cards, MassDOT's EZPASS payment system, Apple Pay/Passbook integration, Google Wallet, and other emerging payment technologies.
- Is compatible (or can be made compatible) with the MBTA's next-generation AFC system.
- Manage the MBTA's parking inventory to understand, anticipate and influence parking use to maximize revenue.
- Reduce administrative costs, especially enforcement costs.
- Provide analytics to maximize revenue return, better utilize the parking inventory and to enhance the experience of MBTA customers that use the MBTA's parking facilities.
- Interface with the MBTA's customer service systems.

The MBTA is committed to Open Source software that provides more flexibility in adapting to advances in technology and reducing reoccurring operating costs. On hardware, the MBTA prioritizes multi-sourced hardware that can be 'plug and play' especially since functionality has migrated from hardware to software. The MBTA will work with the selected Respondent to deploy a smart parking technology solution that achieves its goals while also maintaining the MBTA's technology flexibility.

All the technologies that are proposed by the Respondent shall undergo Factory Acceptance Testing (FAT) as well as Field Testing in one or more MBTA Parking facilities prior to their full deployment across the MBTA Parking System. The MBTA will participate in all phases of equipment testing of the smart parking technologies to be deployed in its structured facilities and surface lots.

The Respondent shall propose technological solutions that achieve the stated goals; at a minimum, the parking solution sought by the MBTA should include the following functions:

1. Occupancy Detection: Collect occupancy data from structure and surface lot parking spaces. The Respondent must clearly define the sensor types that are proposed for MBTA parking facilities. The MBTA will allow a mixture of sensor types if the Respondent provides justification for the use of a variety of sensing/occupancy devices, such as in-ground wireless sensors, magnetometer, video/digital cameras, or ultrasonic means.

The basic functionality required by the MBTA is a sensor-based system that can determine space-by-space occupancy. Sensors will communicate occupancy information through a network of communications devices/equipment that may be mounted on poles or parking structures.

The number of sensors, the manufacturer of the hardware and its unit cost, the installation costs for all sensing/occupancy devices must be accompanied by an explanation of how the devices will communicate with and provide data to the Parking Guidance System and the Pricing Engine. Of particular concern for the MBTA will be the ability of the detection equipment to provide accurate data in snow and other severe conditions. The Respondent's proposal should also present actual experience with the accuracy of the detection system that is proposed.

2. Parking Guidance/Wayfinding: The Respondent will provide a parking guidance system for the purpose of matching riders to available parking spaces in MBTA facilities to reduce train chasing and cruising to locate a vacant parking spot. The guidance system will be a combination of parking availability mobile applications, variable message signs, and dynamic wayfinding signs.

The systems must have an open data feed to allow information to be displayed at stations and incorporated into other applications and systems. Elements of the wayfinding solution may include digital screens and interactive kiosks from

the MBTA's Systemwide Advertising Program for continuity of design and functionality.

3. Asset/Inventory Management and Reporting: The system envisioned by the MBTA will include a comprehensive inventory of all of the MBTA's parking assets including the structures, surface lots, wayfinding and sign systems, sensors and technologies utilized in the management of the parking services. The system will interface with the MBTA's Transit Asset Management or TAM Program and that program's State of Good Repair Database so that parking assets are maintained to the same standards until the end of their useful life. The system will provide the MBTA with the ability to manage its parking structures and surface lots to minimize the total cost of operating and maintaining these facilities in a state of good repair. The system will also collect and provide analysis of the use of the entire parking inventory to provide the MBTA with dashboards and reports to allow for more impactful decisions on the use of the parking inventory.

The MBTA will depend upon the system for managing and understanding its parking supply, distributing parking information to riders and the public, allowing the MBTA to manage its parking supply to maximize revenues, influence demand for parking through the pricing engine, and encourage the use of the MBTA's transit services by making the parking experience as attractive as possible. Additionally, data from the system will be used by the MBTA to submit capital funding requests.

4. Pricing Engine: The system will include a pricing engine that will allow the MBTA to analyze demand and to change pricing dynamically based upon demand. The MBTA will have the ability to deploy demand-based pricing to control demand, especially to balance the use of its structured and surface parking facilities. The pricing tool will also enable the MBTA to offer premium-parking services like valet parking, event parking, and preferred parking.

The Respondent can propose a proprietary pricing solution; however, the Respondent's proposal should provide guidance on the transition at the end of contract to another system or to license that system to the MBTA or to a succeeding contractor.

5. Customer Support: The MBTA wishes to continue the success of the customer service strategy it has deployed by having inquiries from any channel directed to its customer service center. The successful Respondent will support this initiative by ensuring integration in all applicable technology.
6. Application Program Interface (API) Integration: The MBTA will require the successful Respondent to develop an API that will allow for data exchange, transfer and validation. The MBTA retains the sole authority to issue API licenses to access its parking data. The selected Respondent will develop the API integration with existing MBTA systems as required through a cloud-based software-to-software solution.
7. Payment Technology: The successful Respondent will inherit pay-on-foot multi-space pay stations. Maintenance of these legacy payment devices will be required until the technologies proposed in this plan are deployed. The MBTA seeks to expand and make consistent the payment options available to customers using its parking facilities by offering the following payment options, where feasible:
 - Expanded Mobile Payment Applications
 - EZPASS Plus for Parking
 - Next Generation Farecard System (when launched)
 - Contactless Payments

4.11 Annual Audits

MBTA will execute periodic/annual financial and physical audits of the entire parking services inventory awarded as a result of this RFP. Audits will reconcile the successful Respondent's revenues for the same period of time. Audits may serve as an assessment of the Respondent's performance in compliance with the terms and conditions of the resulting agreement, especially for revenue increases, attaining occupancy rate goals, and enhancing the parking environment. The MBTA will choose the firms to execute both audits with the successful Respondent paying for both audits.

The physical audit will be a visible count of all parking services assets. Fiscal audits will constitute a detailed review of the Respondent's revenues collected on behalf of the MBTA by any means of parking payment. This will include the collection of revenues and billing records for the purpose of equating that revenue to the use of the MBTA's parking inventory, and that the amounts collected were in accordance with the parking rates approved by the MBTA.

The results of both reviews shall be compared with the selected Respondent's billings and any deficiencies or irregularities shall be corrected in the Respondent's billing statements within fifteen (15) business days of notification by MBTA. Any net underpayment to the MBTA disclosed by audit shall be due at a rate of three (3) times the amount and payable to MBTA.

The Respondent will present samples of its compliance with physical and financial audits for existing clients and its procedures to make data available for those reviews.

4.12 Reporting

Required reporting must be available through a central dashboard system, Comma Separated Value (CSV) file transfer to FTP site, and data feeds via open APIs. The Respondent's response to the RFP will detail its reporting procedures and processes. In particular, the Respondent will present samples of how it interfaces with client reporting systems and protocols.

Respondents shall provide copies of all vendor or subcontractor contracts prior to the effective date thereof. Electronic copies shall be presented in a sortable spreadsheet file format or posted via the methods previously outlined in this section. A sample of reporting requirements is included on the next page.

SAMPLE REPORTING REQUIREMENTS

Data	Details	Format	Frequency
All inventory by structure or surface lot	Includes location characteristics: <ul style="list-style-type: none"> • Structure and surface lot • Geographic location-City, Town and/or MBTA service 	Plotted on MBTA GIS/Asset Management Plan Detailed maps of each location (station, transit center, structure or surface lot)	Monthly
Equipment malfunctions and repairs	Includes equipment type, malfunction, party addressing repairs, expected length of time to repair, testing to ensure quality.	FTP management site or similar; access provided to MBTA with function to download in Microsoft Excel format	Daily
Smart parking equipment	Daily preventative and scheduled maintenance of all elements of the Smart Parking System	Comprehensive reports detailing device malfunctions and repairs	Daily
Occupancy rates	Parking inventory utilization by location and by time of day	FTP management site or similar; access provided to MBTA with function to download in Microsoft Excel format	Real-Time Daily Weekly Monthly
Maintenance schedules	Records of maintenance activities	FTP management site or similar; access provided to MBTA with availability to view digital records and function to download in Microsoft Excel format	Weekly Monthly
Expense report	A report of extraordinary expenses incurred in the management of parking services	FTP management site or similar; access provided to MBTA with availability to view digital records and function to download in Microsoft Excel forma	Weekly Monthly

Enforcement schedules	License plate recognition by location and time of day	FTP management site or similar; access provided to MBTA with function to download in Microsoft Excel format	Daily
Revenue by structure and surface lot	In collaboration with the MBTA, prepare a revenue report by location and day		

4.13 Data Ownership

Data that is collected through the devices, technologies and programs on MBTA properties and facilities shall be the property of the MBTA. The successful Respondent will be granted the non-exclusive right to use the data for purposes of increasing revenues associated with the devices, technologies and programs operated under the agreement resulting from this Request for Proposals.

Respondents shall develop reporting tools for the data collected from the devices, technologies and programs developed under the contract resulting from this Request for Proposals. The successful Respondent shall ensure the security of all data collected, and shall not sell or share without the express written approval of the MBTA.

The MBTA takes seriously the retention of sensitive customer information critical to the business viability of the MBTA. Moreover, the protection of this information is paramount because of the ever-present threat of theft or identity fraud. As the MBTA and its Contractor(s) implement, upgrade, and extend their information technology systems and resources, they shall do so with respect to all applicable laws, regulatory compliance and best practices to maintain the confidentiality, integrity, and availability of sensitive customer information. Additionally, the Contractor selected from this Request for Proposals shall create an Information Privacy and Security policy to be approved by the MBTA.

The Respondent shall demonstrate the measures his organization takes in securing the data that it houses, transferring and protecting data for his clients and their customers.

4.14 Labor, Training and the Cost of Services

The successful Respondent shall utilize its own labor, at its own expense, to perform all work associated with the management of the MBTA's parking services. Each of the Respondent's employees working on and around the MBTA's facilities must be safety-trained/briefed by the MBTA in accordance with MBTA certification and re-certification procedures prior to working on MBTA property.

The MBTA requires the Respondent to represent the education and experience requirements of those to be recruited for the Management of its Parking Services through a detailed explanation of its Labor and Training practices. Further, the Respondent must present a comprehensive training program that each of the employees assigned to the management of the MBTA's will undergo prior to entering service.

It will be necessary for the Respondent to compensate the MBTA for certain services it provides to allow for the development, installation or maintenance of new elements on or in the MBTA's facilities, if these activities result in the need to provide additional safety precautions, such as flagmen, Police protection or if the work that is required to be performed is covered under an existing MBTA labor agreement. In these situations, the MBTA will bill the successful Respondent for all direct and indirect costs of labor and materials.

The Respondent shall describe in detail its practices for recruiting, training and retaining employees.

5.0 General Contract Provisions

5.1 Exclusivity

The MBTA grants the successful Respondent the exclusive right to manage the parking facilities, develop parking programs, and deploy technology as detailed in this RFP.

Any new development of programming shall be developed in cooperation with the MBTA, which retains the sole right to determine the parameters of new program development. The Respondent's exclusivity hereunder extends only to the locations proposed in response to this RFP; however, the successful Respondent may suggest changes to the existing inventory. All decisions regarding such changes rests with the MBTA.

The Respondent agrees to assume all costs to design, manufacture and install new technologies and programs, and will assume all costs to maintain the existing parking inventory. All such activities shall be performed in accordance with governing statutes and regulations.

5.2 Existing Parking Equipment

The successful Respondent agrees to assume the existing inventory of the parking program in an 'as is' condition. Should the successful Respondent choose to upgrade, refurbish or replace the existing inventory, said Respondent will do so at its own cost.

5.3 Licensing and Approval Processes

The successful Respondent shall perform all services necessary in the name of the MBTA and on behalf of the MBTA to obtain the necessary permits and approvals required to develop, design, install, maintain and sell parking on MBTA property in accordance with governing statutes and regulations.

The Respondent shall manage the licensing/permitting process throughout the term of the agreement resulting from this RFP. At the end of the term of the agreement, the successful Respondent will cooperate with an orderly transfer of licenses/permits to the MBTA, or its designee.

5.4 Privacy Policy

The Respondent must adhere to the MBTA's Privacy Policy, especially in the collection, use and transmission of data. The successful Respondent shall always provide riders with the ability to opt out from the collection of data or from tracking. The successful Respondent will agree to share information/data that impacts the use of services and facilities with the MBTA. The successful Respondent will not sell or share information without the prior approval of the MBTA.

5.5 Right of Entry and Egress and Transportation

MBTA grants to the successful Respondent, subject to the rules of MBTA, the right of duly authorized and properly trained and identified representatives of the Respondent to enter into and on the property of the MBTA for the purpose of managing the MBTA's parking system and maintaining its facilities and parking assets.

The successful Respondent's employees and subcontractors are not employees or agents of the MBTA and will not be provided with free parking at MBTA facilities, nor will they be allowed to ride MBTA services without paying the required fare.

The successful Respondent's employees working on and around MBTA property shall wear and properly use safety gear, including appropriate clothing, hardhats, protective eyewear, vests and tools at all times while on MBTA property. The MBTA shall provide "MBTA Contractor Identification Cards" to those representatives of the Respondent that require access to the facilities of the MBTA. The MBTA Contractor Identification card is issued for identification purposes only and is not valid for payment of fares. All work shall conform with all current safety practices, including, but not limited to Federal Transit and Federal Railroad Administration Safety Rules.

5.6 Assignment of Future Vendor Contracts and Subcontracts

At the end of the term of the agreement resulting from this RFP or upon contract termination, the successful Respondent shall immediately transfer all existing vendor contracts and subcontracts to either to the MBTA or its designee. No payments shall be made to the successful Respondent if the contract is terminated early for default. In the case of disputes over the revenue, the MBTA shall make final judgment on the division of revenues.

5.7 Ownership at Contract Expiration

Ownership of all parking assets, devices, structures and signs as well as network systems shall become the absolute property of MBTA upon expiration of the contract awarded as a result of this RFP.

5.8 End of Contract Transition

The selected Respondent will cooperate with the MBTA at the end of the term of the agreement that results from this Request for Proposals to transition all of the assets purchased under the agreement to the ownership of the MBTA, and to assign essential contracts to the MBTA or its designee. For this purpose, the selected Respondent will develop a Contract Transition Checklist that will detail all the assets whose ownership will transfer to the MBTA or its designees; all contracts for services or products that are essential to the operation of the MBTA's parking services and all passwords, codes, locks, keys and other securement devices. This checklist will be provided to the MBTA prior to the final contract year for review and approval.

5.9 Interruptions in the Operation of the MBTA Services

The MBTA does not contemplate any interruptions in the operation of its services during the term of the agreement that results from this Request for Proposals. Under any circumstance, the successful Respondent shall present no claims for lost revenue during the period of the agreement.

5.10 General Terms and Conditions

The selected Respondent will be expected to, at a minimum, agree to the general terms and conditions set forth in **Attachment 3 General Terms and Conditions** located on the MBTA Site.

6.0 Selection Process

6.1 Basis of Award: Best Value Proposal

The MBTA anticipates that it will award a single contract for the management of the parking services detailed in this RFP, although as noted in Section 1.0, the MBTA reserves the right to assign the responsibility for its parking services to more than one Respondent if that is deemed to be in the MBTA's best interest.

The basis of award is the Request for Proposal response and the resulting presentation, if required by the MBTA. The selection process will determine which of the Respondents will be determined to be most responsive to the RFP:

- possessing the management, financial, and technical capabilities necessary to fulfill the requirements of the contract;
- conforming to the solicitation requirements stated herein; and,
- whose proposal is judged through a thorough assessment of the general considerations and specific criteria to be most advantageous to the MBTA, with price and other factors considered.

The MBTA's selection process will also determine which of the Respondents share the vision of the MBTA to maximize parking revenues while enhancing the customer experience and environment.

For purposes of this procurement, the technical and price proposals offered to the MBTA, and commitment to the MBTA's vision for its parking program are the most important criteria for selection. The MBTA may select a Respondent that does not offer the best price proposal, but, rather, offers the most effective and efficient solutions for its parking services through innovation and technology as desired by the

MBTA. If proposals are determined to be technically comparable, then the price proposals offered to the Authority become the most important factor.

The MBTA is most concerned with making its parking program assets as effective and efficient as possible to maximize revenues. The MBTA also seeks to enhance the experience for its customers, and increase their loyalty by providing them with the best level of customer service through impactful, high quality advanced technology options that are scalable to future needs and technologies, and innovative services.

Respondents are advised that award may be made without discussion or any contact with the Respondents concerning offers received except for clarifications.

6.2 Evaluation Objectives and Methodology

The principal objectives of the evaluation process are to:

- Determine which proposals are responsive to the requirements of the RFP.
- Determine from among responsive proposals received, which are most advantageous to the MBTA, considering technical, price and other factors outlined in the RFP.
- Provide a sound basis for the MBTA to make an informed, fair and advantageous selection.

6.3 Technical Evaluation Criteria

The MBTA will place great emphasis on proposals that are the most responsive to the technical requirements of the RFP. The experience of the Respondent in managing similar parking programs as well as its proposed staff, especially the Project Manager, and the Respondent's vision for increasing revenues and enhancing the customer experience are important criteria.

The following technical criteria separate or combined in some manner, and not necessarily listed in order of significance, will be used to evaluate and then rank proposals received in response to this RFP:

- **Financial Capability:** This is a pass/fail criterion. Those Respondents who do not pass this element will not be considered further. The Respondent shall provide evidence of financial capability to the MBTA. The Respondent shall provide audited financial statements, or comparable documentation, for the five (5) most recent fiscal years.
- **Qualifications of the Firm:** Previous experience in managing parking programs of a similar size and implementing work plans that have maximized revenues for public and private sector clients, and/or experience in smart parking technology.
- **Approach & Methodology and Work Plans:** Understanding of project scope and issues, the substantive work plans to increase parking revenue and enhance the customer parking experience.
- **Technology:** Smart parking technology is at the core of the MBTA's new vision for its parking program. The Respondent must demonstrate a shared vision through a commitment to maximizing parking revenue through effective technology implementation that increases efficiency over the initial term of the agreement.
- **Innovative Approaches:** A detailed plan by the Respondent to generate revenues and increase customer loyalty through innovative services and strategies that enhance the customer experience at their first and last touchpoint with MBTA services. Such services and strategies should cater to the unique populations in the MBTA service area, especially discretionary commuters by introducing new customer-friendly technologies and programs.

Respondents are advised that the MBTA reserves the right to request presentations for the Respondents to discuss details of their proposals and/or to request written clarification or additional details necessary to clearly understand the proposal. All such additional, supplemental or clarifying information may be considered as part of the technical evaluation of proposals. Meetings shall be held at the request of the MBTA with reasonable advance notice to the Respondents.

6.4 Technical Proposal Evaluation

The MBTA Evaluation Committee comprised of MBTA and MassDOT employees will score RFP responses on the Technical Criteria listed in Section 6.3. Each Respondent should provide a detailed description of its approach to these criteria, adding information regarding further benefits of the proposed approach. The Committee will score each Respondent's proposal using these Criteria. Information obtained from References provided by a Respondent will weigh heavily in the Committee's evaluation.

The MBTA, at its discretion, may require a Respondent to make an oral presentation prior to completing its evaluation of the Respondent's Technical Proposals. Each criterion will be evaluated considering the information included in the Technical Proposal related to the criterion, including the Respondent's responses to the requirements and questions, as well as other information that may be gathered from references, oral presentations, or other sources.

The Technical Proposal evaluation factors and the overall Technical Proposal will be rated using a numerical rating approach developed and agreed by the Evaluation Committee. This will be based on the following general categories:

1. Excellent: when the Respondent has presented and supported an approach that is considered to significantly exceed stated criteria in a way that is beneficial to the MBTA. This rating indicates a consistently outstanding level of quality,

with very little or no risk that this Respondent would fail to meet the requirements of the solicitation. There are no weaknesses.

2. Good: when the Respondent has presented and supported an approach that is considered to meet the stated criteria. This rating indicates a generally better than acceptable quality, with little risk that this Respondent would fail to meet the requirements of the solicitation. Weaknesses, if any, are very minor and not material to the proposal. Correction of the weaknesses would not be necessary before the Proposal would be considered further.
3. Satisfactory: when the Respondent has presented and supported an approach that is considered to possibly meet the stated criteria. This rating indicates a level of risk to the MBTA. Weaknesses exist but may be corrected through requests for Clarification or Communications.
4. Poor: when the Respondent has presented and supported an approach that fails to meet stated criteria and would pose a clear risk to the MBTA. The issues may be susceptible to correction through major and lengthy discussions. Such a response is considered marginal in terms of the basic content or amount of information provided for evaluation.
5. Non-responsive: when the Respondent has presented and supported an approach that indicates significant weaknesses or unacceptable quality, or fails to include evidence that it is capable of providing the services requested. The Proposal fails to meet the stated criteria or lacks essential information. There is no reasonable likelihood of success; weaknesses are so major or extensive that a major revision to the Proposal would be necessary.

The Committee will perform its Technical Evaluation before opening Respondents' price proposals.

6.5 WBE/MBE Diversity Program Requirements

It is the policy of the Commonwealth and the MBTA to ensure non-discrimination in the procurement of goods and services. It is the MBTA's intention to create a level playing field on which all Respondents and subcontractors can compete fairly for contracts. The MBTA promotes equity of opportunity in state contracting; and to that end, encourages full participation of minority, women and other disadvantaged owned businesses as defined by the Commonwealth's Supplier Diversity Office.

The MBTA further recognizes the importance of meaningful partnerships involving subcontracting with minority, women and other disadvantaged owned businesses. All bids must provide good faith small business plans. The MBTA also requires a supplier diversity plan containing meaningful minority, women and other disadvantaged owned business commitments.

The MBTA encourages and expects the Respondents to pursue and encourage partnering opportunities with and for minority, women and other disadvantaged owned businesses. The selected Respondent is encouraged and expected to create a level playing field to the maximum practical extent consistent with the objectives and requirements of the MBTA policy. Therefore, the Respondent is requested to document its efforts to include minority, women and other disadvantaged owned businesses in this contracting opportunity. Respondents are also requested to explain in their executive summary how they intend to utilize and encourage partnering opportunities with minority, women and other disadvantaged owned businesses for this project.

The minority, women and other disadvantaged owned businesses Plan requirements and participation objectives apply to the total value of the Contract including post-award change orders and modifications. Submissions will be evaluated based on the Respondent's approach and demonstrated commitment to the MBTA's Diversity and Civil Rights Programs, ability to successfully respond to the contract's minority, women

and other disadvantaged owned businesses participation requirements, and compliance with the overall MBTA policy.

6.6 References

As noted above, the Evaluation Committee will place significant weight on information gained from discussions with Respondent's references. Please provide five references (5) with the following detail:

- Name of the Reference Agency or Organization
- Nature of Contract-Private Parking, Public Parking, Structured, Surface or On Street
- Length of Existing Contract, Type of Contract-Fee, Revenue Share or Performance based
- Name of Primary Contact- (Jerry Jones, Vice President of Communications, 905-222-1234, jjones@jonesdevelopment.com

6.7 Cost/Price Proposal Criteria and Evaluation

Respondents will complete **Attachment 1: Price Proposal**. Respondents may suggest revenue share options that consider the capital expense of improving the facilities, implementing technologies, and innovative services.

Each Respondent's Cost/ Price Proposal will be evaluated for reasonableness, realism, and completeness. Significantly unreasonable or unrealistic cost or revenue projections/estimates may be determined to be grounds for disqualifying and disregarding the proposal. Cost information or clarifications regarding costs and costing assumptions for the build out of the required parking technologies and other new technologies may be requested. As noted above, Respondents must submit the Cost/Pricing Proposal Form in a separate, sealed envelope and on a separate USB drive with their bids.

6.8 Tax Exemption

The MBTA is exempt from Federal Excise Tax, including Transportation Tax, and will furnish properly executed tax exemption certificates upon request. The MBTA is also exempt from Massachusetts State Sales Tax – Exemption Number E-042-323-989. As an independent Contractor, the Contractor alone shall be responsible for payment of all federal, state and local taxes of all types.

6.9 Negotiation Procedures and Best-And-Final Offer

At the sole discretion of the MBTA, Respondents will be advised if a Best and Final Offer ("BAFO") will be issued. The BAFO must be submitted by the scheduled closing date and time. Upon receipt of each BAFO, the Evaluation Team will conduct a final review of the proposals.

The MBTA also reserves the right to enter into negotiations with the selected Respondent.

6.10 Contract Award

When the Contracting Officer determines that an award can be made that is judged by the MBTA to be in its best interest, a recommendation is then made to the Chief Procurement Officer to proceed with making the award. The Chief Procurement Officer, or Designee, prepares a request for approval by the General Manager and the Financial Management Control Board ("FMCB") that contains the Evaluation Committee's documentation supporting the final recommendation. Following receipt of the General Manager's and FMCB's approval, all Respondents will be advised, in writing, of the MBTA's final decision. The Contract will then be executed between the MBTA and the selected Respondent.

