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**PROPOSAL EVALUATION WORKSHEET (INDIVIDUAL)**

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**EVALUATION FACTOR: MECHANICAL SERVICES PLAN (RATED)**

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**PROPOSER:** MBCR #9

**DATE:** 8/26/2013

**OVERALL RATING:** Acceptable

**NARRATIVE SUMMARY:** Overall mechanical section was acceptable. Sufficient detail was not provide on how many of the proposed changes will actually be implemented. Data from MCS indicated potential for high costs. DMU plan was well presented and provides future initiatives the MBTA would be interested in.

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**Objective:**

The following are the objectives for the Mechanical Services Plan evaluation factor:

- 1) To identify Proposers that have a plan that best maximizes equipment availability and reliability;
- 2) To ensure that Proposers have an integrated approach to customer and employee safety and hazard reduction;
- 3) To ensure that Proposers have a mechanical services approach that preserves and prolongs asset lifespans;
- 4) To ensure that Proposers have a plan for providing cost effective facility utilization, work scheduling and integration of new training and technology; and
- 5) To ensure that Proposers understand the economies of the integration of the new fleet as it is introduced to the Commuter Rail Services and the associated maintenance changes that will accompany changes to the fleet.

**Evaluation Criteria:**

The Proposer has submitted a plan that best maximizes equipment availability and reliability and that provides for cost effective facility utilization, work scheduling and integration of new training and technology. The Proposer has described an

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integrated approach to customer and employee safety and hazard reduction, as well as an approach that preserves and prolongs asset lifespans. Additionally, the Proposer has demonstrated that it understand the economies of the integration of the new fleet as it is introduced to the Commuter Rail Services and the associated maintenance changes that will accompany changes to the fleet.

**Instructions:**

Evaluators must rate each requirement outlined in the table below as one of the following: (i) Exceptional; (ii) Good; (iii) Acceptable; (iv) Potential to Become Acceptable; or (v) Unacceptable. Please note the following explanations when rating each requirement:

- 1) A rating of Exceptional is appropriate when the Proposer has demonstrated 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 Proposer would fail to meet the requirements of the solicitation. There are no weaknesses.
- 2) A rating of Good is appropriate when the Proposer has demonstrated an approach that is considered to exceed stated criteria. This rating indicates a generally better than acceptable quality, with little risk that this Proposer would fail to meet the requirements of the solicitation. Weaknesses, if any, are very minor. Correction of the weaknesses would not be necessary before the Proposal would be considered further.
- 3) A rating of Acceptable is appropriate if the Proposer has demonstrated an approach that is considered to meet the stated criteria. This rating indicates an acceptable level of quality. The Proposal demonstrates a reasonable probability of success. Weaknesses exist but can be readily corrected through requests for Clarification or Communications.
- 4) A rating of Potential to Become Acceptable is appropriate if the Proposer has demonstrated an approach that fails to meet stated criteria as there are weaknesses, but they are susceptible to correction through Discussions. The response is considered marginal in terms of the basic content and/or amount of information provided for evaluation, but overall the Proposer is capable of providing an acceptable or better Proposal.
- 5) A rating of Unacceptable is appropriate if the Proposer has demonstrated an approach that indicates significant weaknesses and/or unacceptable quality. The Proposal fails to meet the stated criteria and/or lacks essential information and is

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conflicting and/or unproductive. There is no reasonable likelihood of success; weaknesses are so major and/or extensive that a major revision to the Proposal would be necessary.

Ratings for each requirement must be recorded in the associated Rating column, and a detailed explanation of why a particular rating was given to a requirement must be recorded in the associated Comments/Justification for Rating column. The Appendix B Section column identifies relevant sections of Appendix B (Operations and Management Proposal Instructions) to the Instructions to Proposers.

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Requirement No.	Appendix B Section	Requirement	Rating	Comments/Justification for Rating
1.	B5.2(A)	<p>The Proposer shall provide a Mechanical Services Plan that describes in detail the Proposer's approach to providing the mechanical services described in the Contract, including the mechanical services described in Schedule 3.3 (Mechanical Services) of the Commuter Rail Operating Agreement. Elements of the Mechanical Services Plan shall include, but not be limited to, proposed approaches to the following:</p> <ol style="list-style-type: none"> <li>1) Developing and implementing complete maintenance planning, tracking and recordkeeping systems to maximize vehicle availability and reliability;</li> <li>2) Inspecting, maintaining and repairing of the MBTA commuter rail fleet of passenger coaches and locomotives;</li> <li>3) Maintaining, operating and repairing non-revenue rail vehicles;</li> <li>4) Providing daily cleaning, inspection, fueling, servicing and light repairs of revenue equipment;</li> </ol>	Acceptable	<ul style="list-style-type: none"> <li>• Maintenance planning acceptable - Key elements included: Dedicated fleet mang't team, QA of Trapeze, 24/7 maintenance operations control center, and life cycle maintenance base line.</li> <li>• Proposer seems to be noncommittal to LCM and would prefer RCM. The desired LCM requested in the RFP may require replacing components that have not failed yet but may fail in service resulting in increased delays and other increased expenses. The RCM approach should be a lower maintenance cost however this does not appear to be cited or passed on the MBTA.</li> <li>• Plan to fuel at remote locations seems like an example of not properly managing the fleet to be able to fuel at the proper fixed locations.</li> <li>• Remaining elements of the daily serving and inspection plan seem acceptable.</li> <li>• Inventory control section is good – to be directly linked to accounting system.</li> <li>• Full transparency for the MBTA – this would be an improvement of current system.</li> <li>• Trapeze with added modules will be fully capable of meeting all requirements.</li> </ul>

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Requirement No.	Appendix B Section	Requirement	Rating	Comments/Justification for Rating
		5) Providing periodic overhauls and minor upgrading work, as required;  6) Enforcing third-party warranties;  7) Maintaining a comprehensive and up-to-date inventory control system;  8) Providing information management, material management, performance analysis and reporting;  9) Integrating new technologies and work practices as introduced by the Operator or the MBTA;  10) Implementing, operating and maintaining FRA approved Diesel Multiple-Unit cars (each, a "DMU") that the MBTA may purchase (during the Term of the Agreement) and require the Operator to place into service in lieu of locomotive-coach train sets. The Proposer shall address, at a minimum: (i) the potential impact on train operations; (ii) potential changes, if any, required to collective bargaining agreements with respect to on-board train operations (focusing on minimum crew size for on-board		<ul style="list-style-type: none"> <li>Remaining sections were acceptable. All minimums appear to be meet.</li> </ul>

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Requirement No.	Appendix B Section	Requirement	Rating	Comments/Justification for Rating
		<p>crews for single and multiple unit DMU train sets); (iii) fueling issues; (iv) training issues; (v) maintenance for DMU cars (including any required changes at maintenance facilities); and (vi) procedures to calculate the "net financial impact" due to the introduction of DMU cars and/or retirement of locomotives and coaches;</p> <p>11) Operating the re-railing crane; and</p> <p>12) All reporting required by US DOT, FRA, EPA, MDTE, APTA, FTA as well as other applicable laws, rules and regulations.</p>		
2.	B5.2(B)	The Proposer shall submit Maintenance Plans and provide corresponding Maintenance Cost Schedules (each, an "MCS") for all MBTA rolling stock that provides revenue service (excluding non-revenue fleet) (see B5.2(B)(i) – (xvi)). The Proposer shall prepare a Maintenance Plan for new or overhauled fleet (as set forth in the Instructions to Proposers, Appendix B (Operations and Management Proposal Instructions) Section B5.2(B)) that complies with the maintenance requirements	Good	<b>Plan provided good detail with a combination of FRA and OEM requirements and associated intervals. The MBTA is able to get a good understanding of what will be done and when.</b>

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Requirement No.	Appendix B Section	Requirement	Rating	Comments/Justification for Rating
		set forth by the locomotive or coach builder or overhaul contractor. The Maintenance Plans shall be based on life cycle maintenance principles and be woven into the FRA-mandated inspection cycles. The contents of the Maintenance Plan shall comply with and be representative of the requirements of Schedule 3.3 (Mechanical Services) of the Commuter Rail Operating Agreement. With respect to Maintenance Plans for <u>new fleets only</u> , the Proposer shall submit a generic plan for each type of new locomotive and coach (locomotives, BTCs and CTCs only) with its Proposal.		
3.	B5.2(B)	<p>An MCS shall also be developed and submitted for each fleet providing revenue service. For fleets that have both cab and trailer cars, a separate MCS shall be developed for cab cars and trailer cars. The MCS for each fleet type shall be developed using the forms provided in Attachments 1 through 6, which are incorporated to this Appendix B (Operations and Management Proposal Instructions):</p> <p>a) Attachment 4 – MCS for New Locomotives (Annual Unit Cost);</p> <p>b) Attachment 5 – MCS for New</p>	Potential to become acceptable	Costs appear to be inflated. Significant cost of yr 8 for the new HRU coaches.

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Requirement No.	Appendix B Section	Requirement	Rating	Comments/Justification for Rating
		Coaches (Annual Unit Cost); and  c) Attachment 6 – MCS for Overhauled Coaches (Annual Unit Cost).  It should be noted that the total annual MCS costs for the existing locomotive and coach fleet (as summarized in Attachment 3) <b>must equal</b> the Proposer's price for "Mechanical Services" on Form FFP (Firm Fixed Price) for each of the respective years.		
4.	B5.2(C)	The Proposer shall: (i) identify those portions of the information that it provided in response to Section B5.2(A) through B5.2(B) of Appendix B that it considers to be innovative, best practice, beneficial to MBTA Customers and/or cost efficient, and (ii) submit information supporting or otherwise validating its position that said portions are innovative, best practice, beneficial to MBTA Customers and/or cost efficient.	Acceptable	<b>World Class program is not explained very well and does not appear to be an industry known program.</b>  <b>Kiosk's on the work floor seems to be an improved procedure.</b>  <b>Separate North vs South Side plan seems good; however the plausibility of this seems difficult to achieve.</b>

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