
PROPOSAL EVALUATION WORKSHEET (INDIVIDUAL)

EVALUATION FACTOR: MECHANICAL SERVICES PLAN (RATED)

Selection Committee #12

PROPOSER: MBCR

DATE: 9/3/2013

OVERALL RATING: Acceptable

NARRATIVE SUMMARY: The proposer has submitted an acceptable Mechanical Services Plan based on Bombardier's World Class Operations and Maintenance approach. The plan is highlighted by a change in organizational structure led by an established Chief Mechanical Officer and focuses on the evolution from Life Cycle Maintenance to Reliability Centered Maintenance which will result in more efficient scheduling of work and resources, improved training programs, enhanced employee and customer safety and better inventory control and performance analysis and reporting. This maintenance program will be supported by Bombardier and Veolia's worldwide industry experience and vast resources. The program also consists of modernized and robust cleaning services that will result in more enjoyable experience for the customer. Plan also includes Maintenance Cost Schedules for both existing and new rolling stock as well as innovations and best practices for improved mechanical services.

Objective:

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

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- 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 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.

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- 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 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"> 1) Developing and implementing complete maintenance planning, tracking and recordkeeping systems to maximize vehicle availability and reliability; 2) Inspecting, maintaining and repairing of the MBTA commuter rail fleet of passenger coaches and locomotives; 3) Maintaining, operating and repairing non-revenue rail vehicles; 4) Providing daily cleaning, inspection, fueling, servicing and light repairs of revenue equipment; 	Acceptable	<p>Proposer has submitted a Mechanical Services Plan based on World Class Operations and Maintenance model starting with a new organizational structure.</p> <p>Proposer will develop and implement complete planning, tracking and recordkeeping systems based on life cycle maintenance and evolving into reliability centered maintenance with the objective of optimum and safe product availability for revenue service. Effective utilization of resources and a decrease in down time of the fleet will be achieved through the real time monitoring of Trapeze EAM. This will include the creation of a 24/7 Maintenance Operations Control Center, standardized and balanced integrated processes, Reliability Centered Maintenance, robust operational planning, training and competency, root cause analysis, and resolution.</p> <p>Proposer also proposes performing work on a dedicated South Side fleet on the new South Side maintenance facility to cut down on time shifting equipment to BET. This will include a reallocation of resources and manpower to South Side. Additionally it will focus on reducing unscheduled maintenance by proactively monitoring vehicle, fleet and system performance with real time data and trend analysis.</p> <p>Proposer will designate a dedicated Manager and</p>

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		<p>5) Providing periodic overhauls and minor upgrading work, as required;</p> <p>6) Enforcing third-party warranties;</p> <p>7) Maintaining a comprehensive and up-to-date inventory control system;</p> <p>8) Providing information management, material management, performance analysis and reporting;</p> <p>9) Integrating new technologies and work practices as introduced by the Operator or the MBTA;</p> <p>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</p>		<p>personnel who are knowledgeable in freight equipment and the Association of American Railroad(AAR) rules to perform maintenance and repairs on non-revenue cars. The use of a dedicated staff will ensure that work is performed by qualified technicians, proper materials are used, and maintenance and repair functions are completed in a timely manner. Proposer will also work to rationalize the size of the non-revenue fleet.</p> <p>Proposer is committed to making the MBTA Commuter Rail fleet as safe and clean as possible. This task will be achieved through the proper scheduling of resources. Proposer will perform daily inspection , servicing, fueling, cleaning and any needed light repairs according to FRA requirements. All information will be recorded in the Trapeze EAM system. Cleaning process takes advantage of layover time during nights and weekends at all layover points. Work Element Sheets will be developed for cleaning so that all tasks are completed efficiently and meets quality standards. Fueling will be done at BET and Southampton using the new Mobile Fueling Truck. MBCR's Zone Plan and Train Consist Optimization initiatives will provide a benefit as the same equipment will be returned to the same site daily.</p> <p>Periodic component overhauls will be included in the MBCR Fleet Maintenance Plan. Any MBTA approved upgrade or modification to improve a part's reliability or usability will be engineered into the component's</p>

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		<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>		<p>overhaul specifications and documented in the applicable drawings and schematics. MBCR will provide minor upgrade work at the MBTA's request. A Project Manager will develop a production plan for approval by the MBTA. Proposer will also provide an overhaul and retirement schedule for the existing fleet.</p> <p>Through the Reliability and Failure Review Process incorporated into WCO&M, the proposer will support MBTA to identify all issues related to third party warranties, helping the MBTA to realize full cost recovery utilizing Trapeze EAM system.</p> <p>Inventory will be managed through the enhanced version of the Storekeeper Portal in Trapeze EAM, which will be directly linked to the Great Plains Software system for accounting purposes. Proposer manages a current inventory of of 16,000 items and has maintained a 98% accuracy rate over the last three years. Proposer will develop Inventory Maintenance Plan to ensure all inventory control requirements of the RFP are met or exceeded.</p> <p>Using Trapeze EAM, proposer's Material Management Plan will be fully integrated with Maintenance focusing on asset management, state of good repair, capital planning, maintenance operations, parts inventory management and procurement. Proposer will administer its Material Management Information System Plan using</p>

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				<p>the enhanced Trapeze EAM system. Mechanical will be part of the Service Improvement Leadership Team (SILT) focused on finding the root cause of service issues. WCO&M requires service performance monitoring to be a critical responsibility for every manager at MBCR.</p> <p>Proposer will integrate new technologies such as using Alternating Current Field Measurement technology for wheel inspection prior to truing defects. Sentio technology provides on demand access to troubleshooting knowledge by allowing a technician to enter equipment faults into a shop floor kiosk or handheld device. Proposer will also install the Rail Rider GPS Health Monitoring System on all locomotives to monitor critical systems and keep them in good condition. Proposer also commits to focus on predictive maintenance, work practices and training and competency.</p> <p>Proposer has commissioned Parsons Brinkerhoff to do a feasibility study of DMU implementation for MBTA. Working in collaboration with the proposer a plan has been developed to utilize DMU service on lines with close proximity to North and South Station, particularly on Fairmount. Proposer has provided minimally addressed impacts on train operations, changes to collective bargaining agreements, training, fueling and maintenance in the proposal as well as the Net Financial Impact due to the introduction of new cars and possible retirement of existing locomotives and coaches.</p>

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				<p>Proposer will use only trained individuals to operate Kershaw and Mantis cranes safely with the least amount of operational impacts.</p> <p>Proposer commits to timely reporting to all required state and local regulatory agencies as required/requested.</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 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	Acceptable	Proposer has submitted an acceptable Maintenance Plan and Maintenance Cost Schedule for all rolling stock used in revenue service.

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		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> <ul style="list-style-type: none"> a) Attachment 4 – MCS for New Locomotives (Annual Unit Cost); b) Attachment 5 – MCS for New Coaches (Annual Unit Cost); and c) Attachment 6 – MCS for Overhauled Coaches (Annual Unit Cost). <p>It should be noted that the total annual MCS costs for the existing locomotive and coach fleet (as summarized in Attachment 3) must equal the Proposer's price for "Mechanical Services" on Form FFP (Firm Fixed Price) for each of the respective years.</p>	Acceptable	The proposer has developed and submitted a Maintenance Cost Schedule for each fleet providing revenue service.

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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	<p>Proposer has submitted ideas considered to be innovative and best practice such as:</p> <ul style="list-style-type: none"> • Establishment of Failure Review Board • Purchasing a Mobile Fueling Truck • Sentio Technology • Creation of Maintenance Operations Control Center • Utilization of Trapeze EAM • Balanced Maintenance Strategy • Kitting Methods • Alternate Current Field Management • LCM evolution to RCM

Evaluator #12 Sean McCarthy

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