
PROPOSAL EVALUATION WORKSHEET (CONSENSUS)

EVALUATION FACTOR: MOBILIZATION PLAN (RATED)

Selection Committee

PROPOSER: Keolis

DATE: Acceptable

CONSENSUS RATING: 9/13/2013

NARRATIVE SUMMARY: Keolis' proposal on mobilization is acceptable and compliant with the requirements in the RFP. The Plan is comprehensive and demonstrates that the Proposer would successfully effect a seamless transition to the new operating agreement. To support this, Keolis presented their prior experience in successfully mobilizing for Commuter Rail operations of similar size and complexity as the MBTA, including one in the United States. The Proposer has provided a Mobilization Milestone Schedule of significant activities required to successfully assume Commuter Rail operations on July 1, 2014. A Management Steering Committee (Chaired by the CEO of Keolis America) will be formed to oversee and monitor implementation activities. The Proposer's assessment of the IT environment indicates that critical infrastructure needs to be replaced. A cost for IT Readiness of \$676,990 is included in the Mobilization Price. The Evaluation Committee questioned the adequacy of this cost to implement what is perceived to be a very aggressive IT Plan in a short period of time. The Plan includes a comprehensive customer centric training and community outreach program. Weekly meetings will be held with the MBTA to discuss progress on mobilization implementation and the status of the hiring process. The Price Proposal for mobilization services is \$12,451,487 including a Fixed Fee of \$922,332 (8%). The Selection Committee thought the Fixed Fee was high and needed further clarification.

Objective:

The following are the objectives for the Mobilization Plan evaluation factor:

- 1) To identify Proposers that will ensure a seamless transition for customers and employees;

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- 2) To identify Proposers with the demonstrated capacity to establish all operational support and administrative functions and to prepare all necessary documents in a timely and professional manner;
- 3) To identify Proposers with a commitment to ensure consistent and complete communication with the MBTA; and
- 4) To identify Proposers that will minimize overall mobilization and contract cost to the MBTA.

Evaluation Criteria:

The Proposer has submitted a plan that will ensure a seamless transition for customers and employees. The Proposer has demonstrated the capacity to establish all operational support and administrative functions and to prepare all necessary documents in a timely and professional manner and is committed to ensuring consistent and complete communication with the MBTA. The Proposer will minimize overall cost to the MBTA.

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.

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- 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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Requirements No.	Appendix B Section	Requirement	Rating	Comments/Justification for Rating
1.	B13.2(A)	<p>The Proposer shall submit a Mobilization Plan describing in detail the steps it will take to prepare to initiate its performance under the Contract. The Mobilization Plan shall include a step-by-step schedule for performing the mobilization services, including all responsibilities detailed in the mobilization services Schedule 3.12 (Mobilization) of the Commuter Rail Operating Agreement as well as efforts related to information technology as set out in Schedule 3.16 (Information Technology Requirements) of the Commuter Rail Operating Agreement, and, if applicable, a detailed description of the steps that will be taken to ensure a seamless transfer of responsibility for performing the Contract from the current contractor. The Mobilization Plan shall also include arrangements for periodic written progress reports to the MBTA and weekly meetings with MBTA personnel. The Mobilization Plan shall include the following minimum elements:</p> <ol style="list-style-type: none"> 1. Staffing and organization plans, including designation of key management personnel; 2. Employee hiring plans; 3. Description of training programs; 	Acceptable	<p>The Proposer has submitted an Acceptable plan for mobilization that is based upon “four cornerstones”:</p> <ol style="list-style-type: none"> 1. Safe and seamless transition for customers and employees. 2. Safe and seamless transition for the MBTA with consistent and complete communications. 3. Change management. 4. On-time and on-budget completion of all activities. <p>The Mobilization Milestone Schedules on pages 12-37 through 12-48 provides the critical path timeline for each mobilization task.</p> <p>Mobilization team includes experienced personnel who are familiar with the mobilization of rail operations in the United States and internationally. The mobilization activities will be overseen and monitored by a Management Steering Committee and Peer Technical Committees. The Proposer has presented a proven track record of mobilizing commuter rail services for operations of similar size and complexity as the MBTA.</p> <p>Proposer recognizes the need to effectively transition the workforce as a key component of</p>

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		<p>4. Transition and service continuity plans;</p> <p>5. Temporary physical plant requirements;</p> <p>6. Access arrangements required from the MBTA;</p> <p>7. Support required from the MBTA;</p> <p>8. Communications and information management system implementation plans;</p> <p>9. Schedule for delivery of all plans and fulfillment of all activities required during the mobilization period; and</p> <p>10. Plans and procedures for ensuring full implementation of the Commuter Rail IT Environment by the Agreement Services Commencement Date.</p>		<p>mobilization. Proposer will focus on ensuring the organization is fully staffed and functional. An employee orientation program will be held accompanied by a communications strategy to facilitate the transition. This will include:</p> <ol style="list-style-type: none"> 1. Conduct community information and outreach program. 2. Open channels of communications with the employees. 3. Meeting with Union representatives to start negotiating new labor agreements. 4. Orientation program for employees stressing the importance of the MBTA and the riders as customers. <p>Keolis will work to develop a strategic vision for the IT Environment and will replace critical infrastructure that has reached the end of its useful life. The IT assessment and reconfiguration will be led by the CIO supported by the following:</p> <ol style="list-style-type: none"> 1. IT Planning Team 2. IT Diagnostic & Inventory Team 3. System Integrators 4. Network Engineers 5. Senior Application Programmers <p>The Proposer has provided \$676,990 for IT Readiness in the Mobilization Price. A question remains as to the adequacy of the funding to</p>

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				<p>implement what seems to be an aggressive plan.</p> <p>The Proposer will communicate their progress to the MBTA weekly including progress of the hiring process via a series of written reports and meetings. Proposer seeks support from the MBTA during the transition particularly as it relates to the information flow from the incumbent.</p>
2.	B13.2(B)	<p>The Proposer shall include all costs associated with the Mobilization Plan using the mobilization price form included as Attachment 7 to Appendix B (the "Mobilization Price Form"). The Proposer may expand the level of detail provided within the Mobilization Price Form by (i) adding rows to the Mobilization Price Form, and (ii) including, as an appendix to the Mobilization Price Form, narrative text to back up the pricing included in the Mobilization Price Form. The Proposer shall not use the narrative text in the Mobilization Price Form for any purpose other than to back up the included pricing. Any change to the Mobilization Price Form must be carried out in a manner that is consistent with the Mobilization Price Form's current Excel format (less the narrative backup). Any costs deemed unable to fit into allocated cost headings may be distributed into the rows labeled "Spare," but deleting or inserting rows in the Mobilization Price Form is not permitted other</p>	Acceptable	<p>Attachment 7 to Appendix B was included in the Forms and Supplemental Appendices in conformance with the Requirements of this Section. The total Mobilization Cost proposed is \$12,451,487 with a Fixed Fee of \$922,332 (8%). Mobilization Cost Proposal – Detail and Assumptions is included as an Appendix.</p> <p>Integration Team Labor is the largest component of the Mobilization Costs (\$6.6 million) clearly putting an emphasis on the need to allocate resources to the successful transition of Commuter Rail services.</p> <p>The Selection Committee determined the Mobilization Costs to be Acceptable, although the Fixed Fee seemed high.</p>

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		than for purposes of including additional "Spare" rows. Costs provided with the Mobilization Plan and in the Mobilization Price Form shall not be taken into consideration when evaluating the Proposers' Financial/Price Proposal.		
3.	B13.2(C)	The Proposer shall: (i) identify those portions of the information that it provided in response to Section B13.2(A) through B13.3(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>Most initiatives during Mobilization are considered to be good Business (Best) Practices:</p> <ol style="list-style-type: none"> 1. Arthur D. Little will be hired to prepare a comprehensive safety management program. 2. Formation of a Steering Committee of Senior Keolis America management to oversee and track mobilization. 3. Conduct community outreach events including an Operation Lifesaver educational program. 4. Customer centric training programs.

Evaluators #1, #12, & #25

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