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**PROPOSAL EVALUATION WORKSHEET (INDIVIDUAL)**

**EVALUATION FACTOR: MOBILIZATION PLAN (RATED)**

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**Selection Committee #12**

**PROPOSER: Keolis**

**DATE: 9/11/2013**

**OVERALL RATING: Acceptable**

**NARRATIVE SUMMARY:** The Proposer has submitted an Acceptable plan for Mobilization that outlines the plan for the transition of employees, hiring of new employees, occupation of facilities, migration of systems, receipt of plans and cooperative partnership with the MBTA and the outgoing contractor to ensure a seamless continuation of safe and reliable transit services in the most cost effective manner possible. The plan also features a comprehensive training and communications plan.

**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;
- 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.

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**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.
- 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.

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- 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"> <li>1. Staffing and organization plans, including designation of key management personnel;</li> <li>2. Employee hiring plans;</li> </ol>	Acceptable	<p><b>The Proposer has submitted an Acceptable plan for mobilization that is based upon four cornerstones:</b></p> <ul style="list-style-type: none"> <li>-Safe and seamless transition for customers and employees, with proper training, continuity and transition plans.</li> <li>-Safe and seamless transition plan for the MBTA, with consistent and complete communication with the incumbent and the MBTA.</li> <li>-Change management</li> <li>-On-time and on-budget fulfillment of all activities at minimized cost.</li> </ul> <p><b>Based on previous experience, Proposer is confident it can transition effectively using integration teams, speed, leadership, best practices, communication and culture.</b></p> <p><b>Mobilization team includes experienced personnel who are familiar with the mobilization of rail businesses in the United States and internationally. The mobilization activities and overall service implementation will be overseen and monitored by a Management Steering Committee made up of Senior Keolis management and subject matter experts. Proposer will request cooperation and coordination with the incumbent to ensure all transition activities are being carried out on schedule and without disruption to the MBTA service.</b></p>

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Requirements No.	Appendix B Section	Requirement	Rating	Comments/Justification for Rating
		3. Description of training programs; 4. Transition and service continuity plans; 5. Temporary physical plant requirements; 6. Access arrangements required from the MBTA; 7. Support required from the MBTA; 8. Communications and information management system implementation plans; 9. Schedule for delivery of all plans and fulfillment of all activities required during the mobilization period; and 10. Plans and procedures for ensuring full implementation of the Commuter Rail IT Environment by the Agreement Services Commencement Date.		<p>Proposer recognizes the need to effectively transition the workforce as a key component of mobilization. Proposer will focus on ensuring the organization is fully staffed and functional by arranging meetings with the employees in the existing organization, including KCS and the parent companies as well as the goals for MBTA service. Proposer will also work with the Unions and communicate with employees during mobilization.</p> <p>Proposer will administer two orientation modules of approximately four hours each. This program will be for all new employees and held at times that will not interfere with work. This will be accomplished in close coordination with the incumbent.</p> <p>Training programs will include:</p> <ul style="list-style-type: none"> <li>-Who is Keolis Commuter Services?</li> <li>-What resources will Keolis bring to the operation and its employees?</li> <li>-Who do I work for?</li> <li>-What is expected of me?</li> <li>-What is "Think Like a Passenger"?</li> <li>-How can I be successful in the employment relationship?</li> <li>-How is this company managed?</li> </ul> <p>Proposer will also develop an Annual Training Plan within the first 120 days of mobilization. A list of all Keolis training programs is attached on</p>

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				<p>p.29-31.</p> <p>Proposer will rely on incumbent to be involved and cooperate with the transition. Peer review committees will assist in focusing on the key elements of the plan.</p> <p>Proposer will lease temporary facilities for six months.</p> <p>Proposer has identified the areas in which they will require access and ask that the MBTA formalize these requests.</p> <p>Proposer seeks support from the MBTA during the transition particularly in dealing with information flow and communication to and from the incumbent. In addition the proposer request all training manuals or equipment manuals that can be utilized to develop the training classes that are required.</p> <p>Proposer has addressed topic of communications and information management in its emergency response plan. All other systems will be handled through IT. Establishing and maintaining a common operating picture and ensuring accessibility and interoperability are the principle goals the the Proposer's Communication and Information Management system.</p> <p>The mobilization milestone schedule is built around</p>

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Requirements No.	Appendix B Section	Requirement	Rating	Comments/Justification for Rating
				<p>several critical paths which are the following:</p> <ul style="list-style-type: none"> <li>• Mobilization management</li> <li>• Personnel recruitment/training</li> <li>• Administration/Finance readiness</li> <li>• Materials Management readiness</li> <li>• Information Technology readiness</li> <li>• Quality Assurance readiness</li> <li>• Transportation Service readiness</li> <li>• Mechanical Service readiness</li> <li>• Engineering Service readiness</li> <li>• Environmental readiness</li> <li>• Safety/Regulatory/Security readiness</li> </ul> <p>Schedules are attached.</p> <p>During mobilization and under the CIO's guidance the Proposer will provide a variety of expertise that will include but not be limited to:</p> <ul style="list-style-type: none"> <li>-IT planning team to develop detailed plans, oversee execution and monitor mobilization progress under the General Manager's direction.</li> <li>-IT diagnostic inventory teams to establish and confirm knowledge of the existing system.</li> <li>-System integrators to assist with the implementation and integration of the ServiceNow ITP platform and the RIFD tracking and ticketing system.</li> <li>-Network Engineers to work to assure and enhance network design and operations and establish network monitoring.</li> </ul>

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Requirements No.	Appendix B Section	Requirement	Rating	Comments/Justification for Rating
				<ul style="list-style-type: none"> <li>-System and network architect to design and monitor system implementation.</li> <li>-Senior Application Programmers to document application interfaces and assist with integration efforts between the baseline IT environment and our provisioned environments.</li> <li>-Vendor/Supplier personnel to install infrastructure systems and networking.</li> </ul>
2.	13.2(B)	The Proposer shall include all costs associated with the Mobilization Plan using the mobilization price form included as Attachment 7 to Appendix B (the " <b>Mobilization Price Form</b> "). 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	Acceptable	Proposer has included costs using appropriate forms.



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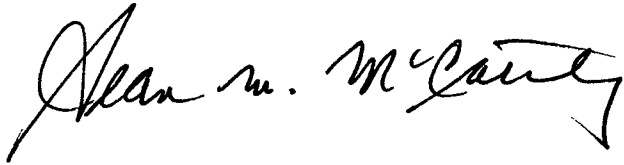
Requirements No.	Appendix B Section	Requirement	Rating	Comments/Justification for Rating
		Price Form. The Proposer shall not use the narrative text in the Mobilization Price Form for any purpose other than to back up the included pricing. Any change to the Mobilization Price Form must be carried out 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 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.	13.2(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><b>The proposer has offered solutions considered to be innovative and/or best practice such as:</b></p> <ul style="list-style-type: none"> <li>• Having all key managers on site by NTP</li> <li>• Using corporate resources to conduct orientation sessions/road shows.</li> <li>• Running a parallel payroll system</li> <li>• Starting integration to secure Cloud system</li> <li>• Steering Committee set up at NTP</li> <li>• Conduct Operation Lifesaver Program an educational outreach in community</li> <li>• Set up office near incumbent</li> </ul>

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Requirements No.	Appendix B Section	Requirement	Rating	Comments/Justification for Rating
				<ul style="list-style-type: none"><li>Try to upgrade existing systems.</li></ul>

Evaluator #12 Sean McCarthy

  
PMT