
PROPOSAL EVALUATION WORKSHEET (CONSENSUS)

EVALUATION FACTOR: MOBILIZATION PLAN (RATED)

Selection Committee

PROPOSER: MBCR

DATE: 9/13/2013

CONSENSUS RATING: Acceptable

NARRATIVE SUMMARY: MBCR's proposal on mobilization was 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. The Proposer has provided a Step-By-Step Mobilization Plan. A very solid Mobilization Team Management approach is planned and will be led by the GM supported by a dedicated Mobilization Team Manager who had overall responsibility for the development of the Proposal. The GM is expected to report on the status of Mobilization to MBCR's Board of Directors monthly. Proposer's Mobilization focus is on upgrading the IT Environment and has included \$5.3 million in the Mobilization Price for IT Readiness. Being the incumbent provider of the services there should be little risk in transitioning to a new contract as the Provider has experience in negotiating Collective Bargaining Agreements with the Unions currently running the service. Proposer will meet weekly with the MBTA to discuss progress on meeting all deliverables and being ready for the start of the new contract on July 1, 2014. The Price Proposal for mobilization services is \$8,986,803 including a Fixed Fee of \$176,212 (2%).

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

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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.
- 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.

PROPOSAL EVALUATION WORKSHEET (CONSENSUS)

EVALUATION FACTOR: MOBILIZATION PLAN (RATED)

- 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.

PROPOSAL EVALUATION WORKSHEET (CONSENSUS)

EVALUATION FACTOR: MOBILIZATION PLAN (RATED)

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>Proposer has submitted an acceptable Mobilization Plan that leverages their years of experience operating the system. The detailed action plan considers the need to have a seamless transition, complete communications with the MBTA and minimizes cost.</p> <p>Mobilization Milestone Schedules providing the critical path timeline for each task is included in the Proposal.</p> <p>Three main objectives during the Mobilization period are:</p> <ol style="list-style-type: none"> 1. Innovations and Service Improvement Initiatives 2. Completion of the Operator Deliverables 3. Preparation of a updated IT Environment 4. Meeting the requirements of the initial Joint Audit <p>MBCR's General Manager will be in charge of the Mobilization effort and will be supported by:</p> <ol style="list-style-type: none"> 1. Mobilization Team Manager 2. Mobilization Project Coordinator 3. IT Project Coordinator 4. Three Working Groups staffed with temporary hires who will assist with IT, Deliverables and

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EVALUATION FACTOR: MOBILIZATION PLAN (RATED)

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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>Joint Audit requirements.</p> <p>All three committees will meet weekly and utilize a Readiness Log for tracking progress on all mobilization tasks and Deliverables.</p> <p>The Mobilization Team will be separate and apart from day-to-day delivery of service.</p> <p>MBCR does not have any significant hiring needs that will need to be addressed during the mobilization period. The Proposer will focus on training and preparing the operating personnel for the new contract requirements. Front-line employees will be instructed on the importance of the two customers, the MBTA and the passengers. All Operations personnel will undergo training and certification in certain National Incident Management System modules.</p> <p>Focus of the Mobilization period will be on the improvements to the IT Environment. Some of the IT initiatives are:</p> <ol style="list-style-type: none"> 1. Digital Repository 2. Operator Service Center Plan 3. Co-Location Center 4. Issue Tracking Portal 5. Enterprise Asset Management 6. IT Lifecycle Management Plan <p>This modernization of the IT infrastructure will</p>

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EVALUATION FACTOR: MOBILIZATION PLAN (RATED)

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				support a more analytical, data-driven operation. Weekly progress meetings will be held with the MBTA throughout the Mobilization period. A Readiness Log tracking progress on mobilization tasks will be made available to the MBTA.
2.	B13.2(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 " 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 than for purposes of including additional "Spare" rows. Costs provided with the Mobilization Plan and in the Mobilization Price Form shall not be	Acceptable	Attachment 7 to Appendix B is included in Section 12.B of the Proposal in conformance with the Requirements of this section. The total Mobilization Costs proposed is \$8,986,803 with a Fixed Fee of \$176,212 (2%). Information Technology Readiness is the largest cost at \$5,348,173 (59.5%). This clearly is an area MBCR believes can be strengthened and is critical for effective monitoring of service delivery.

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		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>Certain Best Practices were cited in the Proposal, such as:</p> <ol style="list-style-type: none"> 1. Experienced Mobilization Team 2. GM and Operational Managers will be certified in the National Incident Management System training modules 3. Adherence to project management best practices as determined by PMI. 4. IT Lifecycle Management Plan

Evaluators #1, #12 & #25

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