REQUEST FOR PROPOSAL
FY17-R-002

for

MOBILE TICKETING AND BACK OFFICE SOLUTION

for

DES MOINES REGIONAL TRANSIT AUTHORITY

Addendum 2

Date: July 11, 2016

Attachment 1:
• Agenda, Minutes and Q&A from the Pre-Proposal Meeting held on July 5, 2016

Attachment 2:
• Submitted Questions and Answers

Attachment 3:
• Updated Proposal Timeline
Pre-Proposal Meeting Agenda
Des Moines Area Regional Transit Authority
RFP FY17-R-002 Mobile Ticketing
July 5, 2016

Introductions

Sign-In Sheet (for those in attendance)

Project Overview

Proposal Requirements
2 Volumes: Technical Proposal & Pricing Proposal
Technical Proposal
Qualifications Submittal
Technical Submittal (include Compliance Matrix)

Pricing Proposal
Pricing Form
Other Required Forms

Key Dates
July 7, 2016    Deadline for Questions regarding the RFP
July 11, 2016    Answers to Questions published
July 15, 2016 2:00 PM Central    Proposals Due
Week of August 1, 2016    Oral Presentations/Interviews with Finalists
September 2016    Selection of Award

Questions?
Attendants:
Lary Chefalo – SPX Genfare
Chung Chung Tam – American Eagle
Jan Lesser – INIT
Kelsey O – Passport Inc.
Zack Browne – Token Transit
Rob Bryans – RouteMatch
Al McLeod – BEA Transit Technologies
John – Gravity Works Design
Amanda Carmody – American Eagle
Chris – Masabi

Project Overview
Dart currently has a number of systems for fare collection and customer information:
- GFI Fareboxes with cash and mag-stripe capabilities that are obsolete
- TransitMaster Fleet Management system with GTFS and GTFS-R data available
- Several mobile websites, SMS application and one mobile application for real-time information

With this procurement DART would like to:
- Procure the foundation for a modular mobile application
- Procure a mobile ticketing module that will become the central back office database for fare collection and ridership data including the ability to capture ridership of each of its Unlimited Access program partners

Follow-On Phases will include:
- Replacement of the farebox including upgraded capabilities for stop level cash transaction reporting and if needed passenger type counting capabilities
- Addition of other modules such as bike share, parking, first & last mile solutions, etc.

Q & A
Can you give more of a description regarding the use of the J-hook card?
The J-hook card is for someone who doesn’t have a credit card or means to load value. The J-hook card gives them an option to load value, whether to a phone or an account. It solves the “unbanked problem” – for customers who don’t have a bank network.

What about customers that don’t have a smart phone – are we assuming that proposer provide a solution for those who don’t have a smart phone?
DART invites proposers to present their capabilities and how would they would address this situation.

What items do we price and what do we get evaluated on? What is the core? What are extraneous elements?
The RFP has laid out the fare products and what DART wants to automate. DART is looking for ideas and feedback from proposers. DART is asking for pricing that addresses the base fare products.
Can you describe the interaction with the bus driver?
Currently the drivers manually key in rides to the GFI farebox (there are approximately 20 codes). DART is open to continuing this process, but it is not ideal. There is TransitMaster on board the vehicles and it has the capability to do passenger counting, but that capability is not currently turned on.

DART drivers will visually validate the pass and DART staff will figure out how to account for it on the vehicle. Ideally there would be an automated validating method of some sort, but DART wants to minimize cost and avoid technology that may become obsolete in quickly. In the short term there will likely be a visual validation of the mobile pass and in the long term DART would like to see an alternative way to validate.

How long is long term?
Approximately 12 months

A smart card is mentioned in the fare policy. Is this project geared towards the smart card solution? Is Phase II addressing a farebox?
This is correct. No smart card and Phase II will address the farebox.

Who is DART using for realtime?
The realtime data is coming from Trapeze/Transitmaster. There is GTFS and GTFS-RT data available also.

Is the GTFS data licensed?
Freely available and published

How strict is the Windows phone requirement?
Present an alternative and DART will consider it (if proposer doesn’t support it).

Regarding Title VI and any discussion of purchasing a day pass on the vehicle - will this be through this system?
Day passes will be part of Phase II.

Is Phase II is separate from this RFP? Or does DART want ideas for Phase II in this proposal?
The current RFP and award will be standalone, but DART is looking for ideas.

Regarding Pass programs - there is a requirement to interface with DART’s existing customer service system. Can you provide a description of that system?
With respect to the Unlimited Access and student programs, DART is looking for a solution around that. The system is an Access database today, but it is outmoded and outdated. DART is looking to bring data into an existing back office system via import, or sell the products directly from the Customer Service window for cash paying customers (for passes). But DART wants to track and manage information through the back end office system.

Other:
Regarding the Compliance Matrix Spreadsheet - proposers can comply with the requirement of suggest an alternative to any and all items (if there are better ways to accomplish the requirements, please suggest alternatives.)

Any references to a smart card will be removed and this information will be in a forthcoming addendum.
FY17-R-002 Mobile Ticketing and Back Office Solutions
RFP Questions & Answers
Addendum 2

1. Are DART drivers provided with a mobile device? If so, is there a standard type of device they are given? Do you expect that device type to change in the near future?

   DART drivers are not provided with a mobile device. There is no expectation drivers will receive a mobile device of any kind for this project.

2. On page 7, Section C, in the reference section, the RFP requests experience of DBEs; is that the experience of the DBE we contract with for DART or the experience of the DBEs we have worked with in the past?

   This reference is to any DBE’s that would provide work on this particular project.

3. Section F, Page 8 requests that we have a Field On-Site Staff. Our Solution does not require on-site support; what is the minimum amount of on-site support required for this contract?

   It is anticipated that onsite support would be provided during key rollout and testing phases. Contractors should state their intentions for which phases of the project rollout will be supported with onsite staff.

4. What is your current process for providing unlimited access and who manages it (DART or the School/Employer)? (Page 9, H(b))

   DART currently manages the program via flash pass. Once an employer/school is added those passes are assigned a key on the farebox for passenger type counting. Currently the employer/school manages access via their ID card distribution. It is anticipated that a mixture of employer/school entities will perform this management themselves, and some will want DART to manage for them. DART had anticipated some sort of web application or similar tool for management of accounts.

5. What systems are expected to integrate with the mobile ticketing solution (ie. trip planning and fare collection systems)? Is the data currently accessible in real time, if not, at what interval is the data uploaded to the back office and on board equipment?

   It is only anticipated that a new fare collection will be integrated with the mobile ticketing back office applications for ridership data accumulation (cash riders). The mobile application that DART is requesting should be capable of integrating multiple applications including the mobile ticketing solution, trip planning, real time information, parking, first & last mile applications, etc.

6. What is the timeline for handheld validators? Is DART expecting a price for handheld validation devices as part of this proposal?
DART anticipates that some method for a supervisor to validate a pass electronically will be provided as part of the base contract. If contractors have alternatives to this requirement, DART would be interested in hearing about those options.

7. Could the agency clarify the ESPP program interface requirements? Specifically, the RFP asks for integration capabilities with existing software and service systems. Could DART elaborate on what those systems are? Ultimately the ESP and OTT programs we would want to move up to the new back office systems and have them be managed in those systems. That being said there are access databases and excel spreadsheets that currently manage this program that we would like to see merged and imported into the proposed back office solution to mitigate duplicate work or excess data entry.

8. P.6. Section 1.C. Should the reference of “Smart Card Systems” be removed? Yes – all references to a Smart Card will show as removed in a marked up version coming out in a subsequent Addendum

9. P.10. Section 1.K.2 Will these interfaces be necessary if there is no onboard hardware device required in this procurement? If these interfaces are necessary, please provide a list of required interfaces. For Phase 1, there are no onboard requirements. It may be possible that Phase 2 would have a validator that has some interface to the farebox and/or the TransitMaster fleet management system that could provide login, route and block information should the mobile ticketing system want to use that data.

10. Please Confirm there are no hardware requirements for this procurement? There are no firm requirements for hardware for this procurement unless a contractor requires hardware for their solution.

11. P. 15. Project Scope …an account based back office application that will form the basis for a smart card ticketing system to be deployed in a second phase along with new farebox technology… Please clarify if smart card ticketing system is one of the requirements in the second phase. An account based system that is capable of integrating future technologies is the interest. Smart cards are unlikely to be part of any phase of this project.

12. P. 16. Project Scope…In Phase 2, separate from the mobile ticketing will be a simple registering farebox… Please confirm in Phase 2, a simple registering farebox is not part of this procurement and will not be considered and evaluated. It is anticipated that a new farebox will be added as a second phase and will not be considered or evaluated at this time. The ability for a contractor to integrate data for cash ridership information in the future will be evaluated and DART would be interested in the contractor discussing their ability to integrate different data sets into a consolidated data reporting system.

13. P. 23 Ticket Validation Application: How many validation devices are required?
Has DART identified any requirements for the validation devices or device quality standards? If so, will that information be shared with vendors?
Quantity = 10; DART is looking for the vendors to provide preferably an application, or a ruggedized device appropriate for transit field use.

14. Will DBE’s utilized on this project be required to be certified in IA in order to meet the DBE requirement? Or are other state certifications acceptable?
DBE’s will be required to be certified in Iowa at the time of contracting. Typically the process to certify in Iowa is seamless if a firm is already certified in another state.

15. Has DART identified a budget for this project? If so, will that information be shared with vendors?
DART is choosing to not disclose its budget for the project.

16. We have a clarification on the RFP scope: Please provide more details regarding the DART giftcard and how it currently works
DART currently does not have a gift card. DART anticipates a method to load value or a product onto a smart card using a “J Hook” card that could be purchased at a retail store such as one of DART’s current pass outlets (http://www.ridedart.com/fares/pass-sales-outlets). DART anticipates that a customer could buy a card and using the code on the card, add a product or value onto their mobile application.

17. We respectfully reiterate our request for a >2 to 4+ week later submission deadline, for us to respond and propose, which was further reinforced during the Q & A session of your July 5th pre-bid conference.
   a. DART goals could potentially be achieved to a much greater extent, if there is time to receive & incorporate the Q&A response Addendum to be published on 7/11. Two-three days is not enough time.
   b. DART-benefiting potential cooperative joint submissions, incorporating Phase 1 & 2 optimization from more than one Proposer, cannot be optimally designed within the current RFP response deadline.
   DART is extending the deadline for proposal submission to 2:00 PM, Central Time Zone on July 22, 2016.

18. Please clarify how RFP Pg. 11, Section 1. O. 1-3 cost driver alternative technologies and components will be objectively evaluated from a selection criteria perspective, if the core Phase I submission items are to be the basis for selecting preferred Proposer(s), as was our understanding from the July 5th DART Pre-Proposal Meeting. Contractors are encouraged to identify ways that DART could improve its offering to its customers should the Contractor have alternative ways to meet DART’s objectives. DART reserves the right to incorporate alternatives that meet the objectives of this procurement.

19. Please clarify the potentially mutually exclusive DART goal of cost effective, innovative solutions, which may be insufficient in Phase 1 and/or potentially somewhat redundant infrastructure costs in Phase 2:
a. Would DART consider RFP modifications that would allow Proposers to deliver solution(s) timed and bundled differently than currently specified, in order to optimize meeting long-term Objectives? Yes

b. A specific example would be to include an on-board ID/fare validator Option (pg. 16) in Phase 1 rather than 2. Could those Phase 2 solutions “count” in an objective way for the Phase 1 core criteria?

Reference: DART Objectives:
   a. Pg. 8-9, H.4.a “Solutions that . . .”
      i. “automate and are scalable . . .”
      ii. “Enable adoption of emerging fare payment technologies.”
      iii. “Improve fare collection data accuracy, integrity, and security.”
   b. Pg. 9, H.4.b “Automate fare collection that:”
      [everything listed in this section is relevant]. Paraphrased:
      i. Reducing human errors, dwell times, and costs,
      ii. while increasing/improving data, efficiency, and reporting.
   c. Pg. 87 Objectives that are consistent, fair, and adaptable to change(s).
   d. Pg. 17, Title VI Concerns incl. the “unbanked” and “Un-Phoned.”
   e. Pgs. 21-24 requirements, features, modules, applications, and alternatives.

Understood. Contractors should state the benefits and costs associated with their approach. DART will make a best value decision based on the scoring requirements outlined within the RFP documents.

20. How will the Functional Requirements Matrix be changed to reflect DART’s responses to these and other submitted questions?
   DART will not update this document. Contractors should reference any changes in their response column. E.g. DART Q/A change to delete “smart card” as an example.

21. What is the DART fleet size and vehicle type(s)?
   Fixed-route to be equipped with this project 111 Fixed Route Buses
   Paratransit / demand response and other vehicles 40 Light Duty/Medium Duty to service paratransit and flex routes

22. If the answers to the questions are due July 11th, logistically that schedule makes it very difficult to adjust RFP responses in time to meet the mailing deadline for delivery on July 15th, we request at least a one week extension.
   DART is extending the deadline for proposal submission to 2:00 PM, Central Time Zone on July 22, 2016.

23. To save paper and to provide as much time as possible to provide a quality response, would the agency consider accepting electronic submissions?
Electronic submission is acceptable. DART is currently working on a method for this.

24. Has the agency surveyed their customer base to gauge how many individuals either lack phones or have smartphones vs feature phones?
   No

25. The pricing form has a line for "Optional Validation System", however there is not a corresponding section for on-going costs of the optional system. DART will add a line for operating costs for this item. This new form will be published in a forthcoming Addendum.

26. Under Category B, for ongoing cost detail, some line items may be variable such as "transaction fees", should we put an estimate of total fees for the year or a percentage ignoring the "Extended Price". If it is an estimate, for what transaction amount should we use in our calculations?
   In lieu of adding a total cost for variable items, please state a unit cost and at what volume there are price breaks.

27. Please describe how DART will score and evaluate the price proposal?
   Low cost will score higher than a higher cost. DART is looking for the best value in both Capital (purchase) and operating costs.

28. One of the base requirements is to notify customers of newly upgraded versions of their device - our scope is typically limited to notifying users when there is a new version of our software, not new devices or new operating systems - we request this requirement be removed.
   The system should notify customers through the application of new versions. DART will work with the vendor and make website announcements for any new operating systems or devices supported.

29. Can you explain in more detail how you envision an account manager would utilize multiple mobile ticketing "applications"? Did you intend for this to read multiple "accounts"?
   DART intends for the system to be able to manage multiple "applications" within one account. Two examples of this are the Unlimited Access program where a manager will oversee the account and applications, and another is a family that may have more than one rider using an application where they could manage passes or add value to each of their member's applications.

30. Can you give more details on this requirement: "Credentials for unlimited pass"?
   It is anticipated that the application with a valid Unlimited Access pass would provide the credentials similar to their badge for access to DART's buses.

31. How many back office administrators does the agency estimate will be utilizing the system?
   Up to a dozen based on function, this would include customer service agents and managers who can load value and should have some restricted levels of access based on their job functions. This would also include the financial team, and the
reporting groups needed to manage the system, approximately a dozen would be expected with easy scaling. Permissions and security design should be put into the proposal.

32. Can you expand on the requirement or provide a use-case so we can ensure we fully understand the requirement being requested. DART anticipates that there will be a web access to the system such that an employer (or DART) could manage each employee account and be able to initially setup employees, add new employees and disable those that have left the employer or are no longer eligible for the benefit.

33. Where will the proposed Point of Sale be used? At DART retail locations? Point of Sale system will only be used at DART Customer Service

34. Can you provide details on the existing DART gift card? Would we require APIs for integrating this payment method or is it a general reload card? There is no current gift card. This is a new requirement to provide a means for retail outlets to provide access to load value or a product using cash.

35. Can you clarify that the agency requests that some products are available on the customer web portal, while others are only available within the app? DART would anticipate that all products (passes or single ride) are available to be purchased within the App, within a web portal and via a J hook card. Some products, such as the Unlimited Access passes should only be managed through the web portal.
SECTION 4: PROPOSAL TIMELINE

4.1. PLANNED PROCUREMENT SCHEDULE

The following timeline has been established for this Request for Proposals:

<table>
<thead>
<tr>
<th>TASK</th>
<th>DATE</th>
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</thead>
<tbody>
<tr>
<td>Date Issued:</td>
<td>June 17, 2016</td>
</tr>
<tr>
<td>Pre-Proposal Conference Call</td>
<td>1:30 PM CDT, July 5, 2016</td>
</tr>
<tr>
<td>Deadline for Questions Regarding this RFP:</td>
<td>July 7, 2016</td>
</tr>
<tr>
<td>Answers to Questions Posted on Website:</td>
<td>July 11, 2016</td>
</tr>
<tr>
<td>Proposals Due:</td>
<td>2:00 PM CDT, July 15, 2016</td>
</tr>
<tr>
<td>Tentative Interviews:</td>
<td>Week of August 1, 2016</td>
</tr>
<tr>
<td>Target Selection:</td>
<td>September, 2016</td>
</tr>
</tbody>
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