



AUGUST 10, 2015

**ADDENDUM NO. 4
REQUEST FOR BEST AND FINAL OFFER
TO**

**REQUEST FOR PROPOSALS (RFP)
FOR 511 SF BAY SYSTEM INTEGRATOR, DATA MANAGEMENT &
DISSEMINATION, AND INTERACTIVE VOICE RESPONSE PHONE
SYSTEM CONTRACTOR, DATED MAY 15, 2015, AS AMENDED JUNE 16,
2015, JUNE 19, 2015, AND JUNE 25, 2015**

Dear Consultant:

The Metropolitan Transportation Commission (MTC) requests your firm to submit a Best and Final Offer (BAFO) to act as the 511 SF Bay System Integrator, Data Management & Dissemination, and Interactive Voice Response Phone System Contractor, as described in Request for Proposals (RFP) dated May 15, 2015, as amended June 16, 2015, June 19, 2015 and June 25, 2015. Your BAFO should be based on the revisions to the RFP described in this Addendum No. 4, taking into consideration also the discussions held with MTC's evaluation panel and the list of questions provided as an attachment to this Addendum. Exceptions to the provisions in this Request for BAFO shall render proposals conditional and shall be grounds for rejection.

BAFO Format and Due Date

Your BAFO must include the following:

- “Red-lined” revised proposal, with all changes to your original proposal indicated by revision text or strike-out. Please submit fourteen (14) bound copies and one electronic copy in Word and Excel;
- Revised Proposal (BAFO) with all changes accepted. Please submit one (1) unbound original BAFO and one electronic copy in Word and Excel.

You may, in addition and at your option, provide a summary of, or a key to, major substantive changes. Your BAFO should include a statement that it is a binding offer for one hundred twenty (120) days from the submission of the BAFO.

Dave Cortese, Chair
Santa Clara County

Jake Mackenzie, Vice Chair
Sonoma County and Cities

Alicia C. Aguirre
Cities of San Mateo County

Tom Azumbrado
U.S. Department of Housing
and Urban Development

Jason Baker
Cities of Santa Clara County

Tom Bates
Cities of Alameda County

David Campos
City and County of San Francisco

Dorene M. Giacomini
U.S. Department of Transportation

Federal D. Glover
Contra Costa County

Scott Haggerty
Alameda County

Anne W. Halsted
San Francisco Bay Conservation
and Development Commission

Steve Kinsey
Marin County and Cities

Sam Liccardo
San Jose Mayor's Appointee

Mark Luce
Napa County and Cities

Julie Pierce
Association of Bay Area Governments

Bijan Sartipi
California State
Transportation Agency

Libby Schaaf
Oakland Mayor's Appointee

James P. Spring
Solano County and Cities

Adrienne J. Tissier
San Mateo County

Scott Wiener
San Francisco Mayor's Appointee

Amy Rein Worth
Cities of Contra Costa County

Steve Heminger
Executive Director

Alix Bockelman
Deputy Executive Director, Policy

Andrew B. Fremier
Deputy Executive Director, Operations

Please submit your BAFO to the following:

Ryan DeCoud
Metropolitan Transportation Commission
Joseph P. Bort MetroCenter
101 Eighth Street, 3rd Floor Receptionist
Oakland, CA 94607-4700
rdecoud@mtc.ca.gov

**Your BAFO must be received by 1:00 p.m., PDT, on Wednesday, August 19th, 2015.
BAFOs received after that date and time will not be considered.**

This addendum modifies the Request for Proposal (RFP) for the SF Bay System Integrator, Data Management & Dissemination, and Interactive Voice Response Phone System Contract as follows. Where text is revised, deleted text is shown in strike-through format; added text is *italicized*.

There is one attachment to this addendum:

- Attachment A: Questions and Clarifications

<u>Addendum Item</u>	<u>Reference</u>	<u>Change</u>
1	RFP, Section V, CONSULTANT SELECTION TIMETABLE Page 22	<p>9:30 a.m., on Wednesday, May 27, 2015</p> <p>4:00 p.m., on Thursday, May 28, 2015</p> <p>No later than three (3) business days prior to the date proposals are due.</p> <p>4:00 p.m., Monday, July 6, 2015*</p> <p>Week of August 3, 2015*</p> <p>Thursday, August 13, 2015*</p> <p>Proposers' Conference, at 101 8th Street, Oakland, CA 94607, Claremont Conference Room</p> <p>Closing date/time for receipt of requests for clarifications/exceptions</p> <p>Deadline for protesting RFP provisions</p> <p>Closing date/time for receipt of proposals</p> <p>Interviews/Discussions (if held)</p> <p>Date for receipt of Best and Final Offers</p>

		<p>Thursday 1:00 p.m. (if required) Wednesday, August 19, 2015</p> <p>Friday, September 11, 2015* MTC Operations Committee Approval</p> <p>*Interview, award and approval dates are approximate and are subject to change before or after the closing date of the RFP.</p>
2	<p>RFP, Section I. MTC AND 511 SF BAY PROJECT DESCRIPTION, Subsection C NextGen 511, Data Collection & Processing Page 16</p>	<p>The following text is added:</p> <p><i>The NextGen 511 SF Bay transit system is a unique and comprehensive transit information system as described below:</i></p> <ul style="list-style-type: none"> · <i>It integrates static data (routes, stops, schedules, fares, etc.) from more than 26 large, medium, and small transit operators in the nine county Bay Area.</i> · <i>Static data will be collected through the new Transit Data Manager (TDM) interface currently under development and expected to be in production before the new contractor assumes the existing system responsibilities. The Concept of Operation document for the TDM is provided as a supporting document, <u>6a Transit Data Manager Concept of Operations draft.pdf</u></i> · <i>On page 7 of the draft Concept of Operations, there is an architecture diagram that illustrates how transit operators will provide static transit service data and eTID configuration data through the TDM into the existing Regional Transit Database (RTD).</i> · <i>The RTD environment includes a number of data processing services, including the one that generates GTFS feed for all transit operators in the system.</i> · <i>The RTD environment also exposes a set of NeTEx formatted APIs described in supporting document 4e, Open 511 Data Exchange Specifications v1 – Transit.pdf, through the Gateway system. The Gateway system architecture is explained Addendum 1, and the Gateway architecture is illustrated in Attachment C of Addendum 1.</i> · <i>The MTC 511 transit system also currently integrates real-time data from 10 of those operators which are integrated in the static RTD; another 6-7 operators are expected to be integrated before the new contractor assumes the system.</i> · <i>The data collection process for the regional real-time</i>

		<p><i>system includes a JMS protocol and several software components in order to receive, process, and disseminate real-time information to downstream applications and services such as 511.org website, 511 IVR, texting, eTID, SIRI formatted APIs, and GTFS-Realtime. Architecture of this data flow is captured in Addendum 1, Attachment E, Real-time Transit Data Flow and Software Components.</i></p>
3	Appendix H-1, Additional Preliminary Requirements	<p>Appendix H-1, <u>Additional Preliminary Requirements</u> is available for download at http://procurements.mtc.ca.gov. Proposers must fill out and return Appendix H-1, <u>Additional Preliminary Requirements</u> with their BAFO.</p>
4	RFP, Section VII Form of Proposal, H. Cost Proposal, Page 31	<p>Item 10 is added. <i>10. The proposer’s cost proposal should not use any of the Element IV System Improvements budget. Expenditures of the Element IV System Improvements budget will be determined by MTC after the award of contract.</i></p>
5	Appendix A, Scope of Work, Element II, Page 45	<p>The Description of Scope for the Traffic Data Scope Component in Table A-1 is modified as follows:</p> <p>The Contractor shall provide traffic data, including traffic speeds and slowdowns, <i>travel times</i>, incidents, construction, and events by utilizing automated interfaces to a 3rd party speed provider, the California Highway Patrol Computer Aided Dispatch (CHP CAD), and the Caltrans Lane Closure System (LCS). <i>The Contractor shall provide travel times for various Origin/Destination pairs to Caltrans for display on Caltrans’ overhead changeable message signs.</i></p>
6	RFP, Section VII Form of Proposal, H. Cost Proposal, item 4 Page 30	<p>4. Appendix B-4, Cost by Task (Firm Fixed Price Costs): Provide a cost breakdown for work that shall be charged as a firm fixed price as specified in <i>Appendix B-1</i> by element and scope component for all four years of the contract period. <i>MTC’s payment structure for Element II will be deliverables-based as shown in Appendix B-4. The total payment percentage cannot exceed 70% before Deliverable II.G.5, Public Beta Launch and cannot exceed 85% before Deliverable II.G.7, Production Launch.</i></p> <p><i>In Element II, under the “Proposed Price per Deliverable” heading, please provide your cost per deliverable for the New</i></p>

		<p><i>System and for the Existing System.</i></p> <p><i>In Element III, under the “Proposed Payment Structure” column, please provide details on your proposed payment structure indicating deliverables numbers, and the deliverable dates.</i></p>
7	RFP, Section VII Form of Proposal, H. Cost Proposal, 1 st paragraph, Page 30	<p>Based on the tasks and staffing plan described in response to <i>Section VII, Form of Proposal, E. Work Plan</i> listed above, provide a breakdown of the expected expenditures of funds for each task in each Element, by Fiscal Year, contained in <i>Appendix A, Scope of Work</i>. The budget should include, but is not limited to, a task budget and a line item budget with billing rates for each Fiscal Year, where applicable. <i>The cost for all of the Mandatory Requirements in Appendix H, which your firm can ‘currently meet’ or ‘will meet’ by the Beta Launch in mid-April, must be included in your cost proposal as part of Element II. Appendix B, Cost Proposal</i> is comprised of six templates that Proposers shall use in providing a breakdown of expected expenditures.</p>
8	RFP, Section VII Form of Proposal, E. Work Plan, item 2 Page 26	<p>2. Provide a staffing plan for each task. <i>Provide a resource matrix that shows the expected time commitment for management and staff, by staff name, by Element tasks and by year. Provide an organizational chart that shows roles and responsibilities of key personnel and reporting structure, including reporting and communication relationships between MTC, Proposer staff, and subcontractors, if any.</i></p>
9	RFP, Section VII Form of Proposal, E. Work Plan, 1 st Paragraph Page 26	<p>This section should present a work plan for the tasks described in <i>Appendix A, Scope of Work</i>. <i>All exclusions to the Scope of Work must be stated; otherwise, your proposal will be considered to cover all scope in Appendix A.</i> The proposed work plan should:</p>
10	RFP, Section VII Form of Proposal, E. Work Plan Page 26	<p>Add item #5 to the Work Plan</p> <p><i>5. The local transit liaison will have the following responsibilities:</i></p> <p style="padding-left: 40px;"><i>a. Communicate with transit agencies on technical matters and data coordination, e.g., static and real-time transit data and standards such as GTFS, GTFS-Realtime, SIRI. Communication would be via phone calls, email and face-to-face meetings, as needed.</i></p>

		<p><i>b. Provide guidance to multiple transit operator's technical teams.</i></p> <p><i>Please identify who will fulfill the role of the local transit liaison for your team and how they will accomplish the above responsibilities.</i></p>
11	RFP, Section VII Form of Proposal, E. Work Plan, Element II Implement System, item 5 Page 27	<p>For the IVR Phone System, describe the proposed hosting solution, IVR platform, telecommunications provider, and text-to-speech engine. Describe your proposed approach to using concatenated human speech, text-to-speech, and/or possible hybrid solutions. <i>Describe your ability to preserve MTC's call flow as shown in the supporting document 5b Phone Tree Menu for 511 Phone System.pdf and describe your recommended changes to the call flow to enhance user experience.</i> Also describe your proposed approach for implementing cost effective multilingual services for Spanish, Mandarin, and Cantonese.</p>
12	RFP, Section VII Form of Proposal, E. Work Plan, Element II Implement System Page 27	<p>Add item #6 to E. Work Plan, Element II, Implement System</p> <p><u><i>Describe your approach to implementation and integration of all items in Tables A-1 & A-2 as part of Element II, Implement System, in Appendix A Scope of Work, including:</i></u></p> <ul style="list-style-type: none"> <i>a) For each item in Table A-1, explain how much new development is required. How will you accomplish this within MTC's schedule of the beta launch in April and production launch in June?</i> <i>b) For each item in Table A-2, discuss any anticipated risks with integrating MTC's existing system. How do you plan to overcome these risks within MTC's schedule? How much development will be required to integrate MTC's existing system with your system?</i> <i>c) Provide a system architecture diagram of your proposed Integrated System (including sub-contractors' systems, if any) and describe how you propose to integrate your new system with MTC's existing system AND other 511 and relevant partner components/systems (as shown in Figure 2: NextGen 511 SF Bay Program and Role of Contractors) to form MTC's NextGen 511 Integrated System. Include a description of your proposed approach to delivery of APIs to the various dissemination channels, including use of both new APIs and MTC's existing Open511 APIs.</i>
13	RFP, Section VII Form of Proposal, E. Work Plan,	Add item #2 to E. Work Plan, Element III, Operations and Maintenance

	Element III Operations and Maintenance Page 28	<i><u>Describe your approach to Operating and Maintaining the Integrated System - Element III, including:</u></i> <i>a) Discuss any risks you foresee in the operations and maintenance of scope components in Table A-1.</i> <i>b) Demonstrate your understanding of the operations and maintenance responsibilities and effort required for each of the scope components in Table A-2, and the risks you foresee in the operations and maintenance.</i>
14	Appendix B, Cost Proposal	Appendix B - Cost Proposal_REVISED_Version 3 is deleted in its entirety and replaced with Appendix_B_-_Cost_Proposal_REVISED_Version 4, available for download at http://procurements.mtc.ca.gov . Only Appendix B-4 was revised. All other appendices remain unchanged. Changes to a Proposer's cost proposal must be submitted with their BAFO using Appendix_B_-_Cost_Proposal_REVISED_Version 4.

Any questions concerning this addendum to the RFP should be directed to Ryan DeCoud, Contract Specialist, at (510) 817-5784 or rdecoud@mtc.ca.gov

Sincerely,



Andrew B. Fremier
Deputy Executive Director, Operations

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