



**Metro**

Metropolitan Transportation Authority

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January 7, 2015

**AMENDMENT NO. 02 TO RFP NO. PS11357  
METRO BIKESHARE**

**INTENT**

This Amendment No. 02 to the subject RFP is issued prior to receipt of submittals, to provide changes and/or clarifications to the RFP. This document and its changes to RFP No. PS11357 have the full force and effect of the original RFP.

Acknowledgement of this Amendment must be made in the space provided in the Proposal Letter under Section 5 of the RFP. (See Pages 5-1 through 5-4).

Please remember that the undersigned remains the sole point of contact on all RFP matters with the following exceptions: 1) Sherie Ayers for **Pre-Qualification** matters at 213-922-5631; 2) Violeta Aguilos for **DEOD** goal matters at 213-922-2639, and 3) Eric Geier for **Ethics** related questions at 213-922-2979.

All other matters should be addressed to the attention of the undersigned only, or to that of an authorized designee. Do not contact other Metro staff or Metro board members about this project until further notice or your firm may be disqualified from participation in this RFP.

**1. Questions received from potential Proposers prior to Pre-Proposal meeting**

Question #1: As I will not be able to attend the pre-proposal, can I obtain a copy of the attendee list?

Answer #1: A copy of the sign-in sheet is attached.

Question #2: Is the Contractor responsible for creating the name, logo and branding for the bike share system? Is the Contractor responsible for undertaking pre-launch system promotion strategy and marketing materials, as well as a launch event? Should the budget include these items?

Answer #2: The Contractor is not responsible for creating the Bikeshare logo or branding for the system. Metro's design studio will work with Metro's project manager and the Contractor team to design and create all marketing materials for the system. However, Metro will request that the Contractor assist Metro with the planning and staging of pre-launch promotion and launch events.

Question #3: Page 2-20 (RR-20.B) - How do ADA requirements apply to the equipment? Do the bikes and/or stations need to be ADA compliant?

Answer #3: Exhibit B – Statement of Work (SOW) has been revised. Please reference the attached SOW, Section A – System Development, Provided Equipment and Installation, **Item #15 (added)**.

Question #4: Page 2-33 (SP-20.B) - Our technology supplier provides their software as a service, with all applications delivered via the web and/or directly to the Bike Share Terminals. As such, they do not typically deliver Software nor Source Code Materials, and Documentation provided does not include maintenance of the Software. They do have a standard software Escrow arrangement which grants access to Software and Source Code Materials under specific circumstances.

Would such an Escrow arrangement be acceptable in lieu of delivering the Software and Source Code Materials?

Answer #4: SP-20 states that the “computer programs and products to be developed and delivered by the Contractor to Metro under the Contract...”

If the proposer is providing computer services that already exist and not creating any software for the contract, then Metro may not need access to the software source code, etc., but Metro will need the royalty free, paid-up, non-exclusive license, in perpetuity.

Question #5: Page 2-100 (Exhibit B) - Who has fundraising scope for the 50% not provided by Metro in subsequent expansions? The respective muni, a sponsor, or the operator?

Answer #5: The respective municipality will be responsible for 50% of the capital costs.

Question #6: Page 2-102 (Project Description/SOW A.9) - Will the City of LA waive any permitting fees or will these fees be under the operators scope?

Answer #6: The Contractor should include permitting and fees in their pricing.

Question #7: Page 2-105 (Liquidated Damages) - Is the operator responsible for liquidated damages in the event of delays due to permitting or other issues outside of their control like litigation, community opposition, etc...?

Answer #7: General Condition (GC) 47, Force Majeure has been added to address the question.

#### **GC-47 FORCE MAJEURE**

**Force Majeure events are limited to (1) events beyond the control and not due to an act or omission of the Contractor, the effects of which materially and adversely affect the Contractor’s ability to fulfill its obligations hereunder, and (2) events, the effects of which could not have been avoided by due diligence and reasonable efforts of the Contractor. Force Majeure events include natural disasters, wars, riots, civil disorders, sabotage, strikes, labor disputes and freight embargos. An earthquake of less than 5.0**

**on the Richter Scale shall not be a Force Majeure event. The Contractor may not assert a Force Majeure for events that are defined as covered Services under the Scope of Work, such as excessive rain. The Contractor may not assert a Force Majeure for any failure to obtain materials necessary to complete its required Services.**

Question #8: Page 2-106 (Project Description/SOW D.1) - Metro asks the vendor to budget costs for TAP integration, but also informs the vendor that Metro will ""communicate the desired level of TAP integration after the Notice to Proceed." Given that costs are dependent upon this TBD scope, could you please clarify what Metro is requesting?

Answer #8: Metro is requesting that the Contractor propose a method of integrating their system's hardware and software with the TAP system at the baseline level in which the Bikeshare system would be able to identify and read the TAP card. Metro's goal is that the Bikeshare may be fully integrated into the TAP system in the future.

Question #9: Page 2-106 (Project Description/SOW C.2) - Revenue transmitted to Metro will be less the transaction fees paid to acquiring bank, transaction processors, etc. Is this acceptable?

Answer #9: This is acceptable.

Question #10: Page 2-107 (Project Description/SOW E.PI-8) - Is it possible to propose alternative Service Level Agreements based on the vendor's operational experience with system uptimes? The 100% uptime does not seem realistic given required downtime for upgrades and maintenance.

Answer #10: See Exhibit D, Required and Desired Bikeshare System Elements Checklist and Exhibit F, Performance Requirement Submittal and provide explanation.

Question #11: Page 3-43 (Table 1.C.Required.8) - Can you elaborate on the scope and nature of TAP integration?

Answer #11: Refer to Answer #8.

Question #12: Page 5-16 (Exhibit C- Pricing Schedule) - Software is listed in capital costs but is typical paid on a monthly basis as a fee. "Hardware" is a vague term. Can you clarify how to treat software if paid as a monthly fee (whether capital or operating) and how "hardware" is distinct from the kiosk and docking station?

Answer #12: Software monthly fees should be included in the monthly O&M fee. Include software capital costs as needed or list zero in the capital cost. Include anything else other than the kiosk, bike or dock in the hardware capital costs.

Question #13: Page 5-16 (Exhibit C- Pricing Schedule) - When Metro describes a 'docking station' is the dock subcomponent being referred to or is Metro referring to the entire station?

Answer #13: The docking station is the component that the bike is locked to or secured in at the bike station.

Question #14: Page 2-104 (Project Description/SOW B.9) - If a listed bike shop/helmet partner is not willing to provide a 10% discount, will Metro subsidize this cost? Will Metro provide funding for the purchase of custom 'Metro Bikeshare' branded helmets?

Answer #14: Exhibit B – Statement of Work has been revised. Please reference the attached SOW, Section B – System Maintenance and Operation, **Item #9 (revised)**.

Question #15: Must we complete and submit the Contractor Pre-Qualification Application as a part of providing a proposal in response to the RFP?

Answer #15: Prime applications are due the same day as the proposal/bid is due. Submit separately from the proposal/bid in a sealed envelope addressed to the Pre-Qualification Office.

Sub contractors applications are not due until the Primes have submitted their proposal/bids and Metro has identified the Prime we will be doing business with. At that time, Metro will ask that prime to have their subcontractors listed with \$'s over \$100,000 submit their applications directly to Metro.

Please do not put your pre-qualification information in the proposal. This also goes for the financial. All information supplied in connection with the PQA is protected from public disclosure by this PUC which states..... "The questionnaire and financial statements are not public records and shall not be open to the public for inspection...."

All information received in this office is stamped confidential and held under lock and key at all times unless the file is in the hands of an auditor, Pre-Qualification representative, or the department manager. No other department has access to these files.

Question #16: Can you please provide a copy of the tables in XLS file format that require responses for ease of formatting? (Exhibits C, D, etc.)

Answer #16: No.

Question #17: Can you provide a submittal checklist that clearly list the desired order of all proposal documents with page limits for each section?

Answer #17: Refer to page 3-36 - Submittal Requirements (Section 1.2 – Proposal Content).

Question #18: Can Metro provide details regarding the potential bike share users market for the areas covered within the RFP. Details regarding the demographics, density and profile of residents (students and employees), this information would help in planning the appropriate scheme and submitting a complete proposal.

Answer #18: This information is available from the census <http://www.census.gov>.

Question #19: In exhibit C (Page 5-18) there are 4 phases of the program with the respective quantities of 490, 936, 763, 533 per phase. Should we consider these quantities as bikes on street, or bikes on street and bikes in maintenance?

Answer #19: Bikes on the street. The estimates were made assuming stations have 10 to 20 bikes depending on estimated demand.

Question #20: In exhibit C (Page 5-20) point four states "Capacity to install stations on public or private property, in a covered area, or outside. As stations are required to run off grid and on renewable energy sources would Metro consider a grid powered station for covered areas?

Answer #20: Metro requires all of the stations to be powered off grid. Metro does not anticipate any stations to be entirely covered. However, in the case of a covered area the kiosk or power charging station should be co-located to access sun exposure.

Question #21: Where do we put the capital costs in the Form 60 then? And where do we put the non capital costs in the Pricing Schedule?

Answer #21: In Form 60, Capital costs can be listed under "Other Direct Cost".

Question #22: 30% weight for "Documented experience on similar projects... as it relates to partnering, working with, and/or securing sponsors / sponsorships."

Yet, the RFP explicitly states in 2 places:

"Advertising or sponsorship revenue shall not be considered or included in the Contractor's proposal. Advertising on the bikes, kiosks, or stations shall be covered under a separate solicitation."

"Advertising or sponsorship revenue shall not be considered or included in this Statement of Work."

These two statements are contradictory. Is it the proposer's responsibility to secure sponsorship?

Answer #22: Metro requires that the Contractor NOT consider the advertising or sponsorship revenue as it relates to the cost of the system in the development and pricing since this is an unknown variable at this time. The intent of the question added in the amendment is to learn if the potential contractor has had any experience in the past operating a bikeshare system that has sponsorships and/or working with sponsors.

Question #23: The RFP states the following on p.142 of the pdf: " Liquidated Damages: In the event Contractor fails to meet the Project Schedule in Section F or the Performance Requirements in Section E, it must pay Metro the amount below according to the phase for every calendar day of delay."

How are liquidated damages assessed for the Performance Requirements in Section E, when there are no measures that are measured in days? Please clarify how this table in Section E relates to the Liquidated Damages \$ amounts.

Answer #23: Liquidated damages are assessed on a daily basis. If these requirements are unattainable please respond in Exhibit D, Required and Desired Bikeshare System Elements Checklist and Exhibit F, Performance Requirement Submittal accordingly.

Question #24: Page 2-101, Launch Schedule - It is specified that "At a minimum, the Street Test should comprise five (5) stations". At the page 2-110 (Table 2 - Project Schedule Chart) it is specified "Deployment of system and bicycles at 10 stations for 2- month test". Should they be considered different tests? Or there is a mistake on the number of sites required?

Answer #24: The correct number of stations is 10. Exhibit B – Statement of Work has been revised. Please reference the attached SOW, Launch Schedule.

Question #25: Page 2-110, Project Schedule Chart - The steps seem to be out of order. Should it actually be 9, 10, 11, 7, 8, 6?

Answer #25: If the contractor would like to propose changes to the schedule included in the RFP then they should include them in the proposal. However, the steps are not sequential.

Question #26: Page 5-30, Exhibit G - Exhibit G suggests the two month street test begins 8 months before live (Milestone 6), but then also suggests that the street test should wrap up 4 months before go-live (Milestone 18). This would imply a four month street test or that the street test actually begins 6 months before go live. Can you clarify?

Answer #26: Metro requires a 2 month street test of 10 stations in the system 4 months before the system goes live per Milestone 18. In addition Metro requires a members only preview month. Metro has deleted Milestone 6 in Exhibit G, project Schedule Milestone Submittal (see attached).

## **2. Pre-Proposal Conference Questions and Answers**

Question #27: DEOD Good Faith Efforts – Do proposers have to state why a DBE firm was included as part of a prime's team?

Answer #27: No. They need to be DBE certified. If your firm meets the 22% DBE goal established in the RFP, firms are not required to explain why the DBE(s) are on the prime's team, but all DBEs must perform a commercially useful function. If the 22% DBE goal is not met, then proposers need to provide Good Faith Efforts.

Question #28: Exhibit C, Pricing Schedule – As the estimated quantity is blank on the pricing schedule for docking stations, is there a ratio of docking stations?

Answer #28: Based on Metro's estimated demand forecast for bikeshare Metro recommends 16.7 bikes per station for the Downtown Los Angeles pilot and 14.4 bikes per station for all other expansion cities and communities including Pasadena and the 8 expansion communities. However, the proposer may offer alternative ratios with a supported rationale.

Question #29: Will Metro consider e-bike trial? How is it weighted/evaluated?

Answer #29: Metro has included electric bikes as a "desired" system element in Table 1 Required and Desired Bikeshare System Element (see attached Evaluation Criteria). The addition of "desired" elements will be evaluated under the **Innovation** criteria.

Question #30: Can you provide more details on TAP Integration?

Answer #30: Metro is requesting that the contractor propose a bikeshare system that would be able to read the TAP card. In terms of technical specifications on the bikeshare system, there must be hardware present on the kiosk or bikes that includes a RFID read/writer with ISO/IEC 14443 international standard capabilities. Contractor should have the ability to communicate directly with the device from their back office and at a minimum read the serial number from the TAP card. However, Metro TAP integration should not prohibit or delay the launch of the pilot program. Metro requires that proposals include a system that is feasible and can be implemented in the 6-9 month implementation required in the Statement of Work.

Question #31: As the period of performance is anticipated to be for seven (7) years and is on a firm fixed price, will the contract allow for future adjustments (prevailing wage, etc.)?

Answer #31: Proposal should account for all costs in the price submittal.

Question #32: Cost proposal – will one original of the cost proposal be acceptable?

Answer #32: Yes.

Question #33: Due to the nature of the project, will Metro consider making multiple awards?

Answer #33: No.

Question #34: Can a one week extension be granted?

Answer #34: Yes. Metro will grant a one week extension. Proposal due date has been extended from Tuesday, January 20, 2015 at 2:00 p.m. (local time) to **Tuesday, January 27, 2015 at 2:00 p.m. (local time)**.

Question #35: Timeline: The anticipated timeline sounded like: contract award expected in June, then roughly 6-9 months before initial bikes on the ground - so actual bikes on the ground would be early 2016 - if all goes well. Is that correct?

Answer #35: Metro estimates that the bikeshare system would open Spring/summer 2016.

Question #36: Funding: The funds already approved are federal and state funding - anticipated to cover two years of operation. Is there any projected order of magnitude of costs? Could be vague: tens of thousands, hundreds of thousands?? Overall or annually? I heard that membership revenue is expected. Is there also advertising/sponsorship revenue expected?

Answer #36: Metro plans to fund the capital portion of the proposed phase 1 Pilot in DTLA with an Express Lanes Net Toll Revenue Re-Investment Grant awarded 2014 (see pg. 2-100 for more information).

Question #37: Area: Is there a map of what the downtown L.A. boundaries are for the initial two-year contract?

Answer #37: The RFP solicitation includes a map of recommended stations, please refer to Attachment A after pg. 2-111 in the RFP package. All locations will be finalized once the contractor is on board and in coordination with the City of LA.

Question #38: Metro Sites: Is there any advance thinking relative to siting bike share kiosks/stations on Metro property - mainly at downtown rail stations. Does Metro anticipate there will be kiosks at places like the ground level of the Chinatown Gold Line Station?

Answer #38: The RFP solicitation includes a map of recommended stations, please refer to Attachment A after pg. 2-111 in the RFP package. Some recommended stations are located at Metro Rail Station where ROW permits and estimated system demand exists based on variables, including, but not limited to population and employment density, job and trip attractors, topography, bicycle infrastructure, and community support.

### **3. Revision to RFP documents**

Changes are bolded, underlined and noted in italics.

- a. **Exhibit B– Statement of Work**, is modified in its entirety (see attachment)
- b. **Evaluation Criteria**, addition of #18 under Table 1, Required and Desired Bikeshare System Elements, Item B: Bicycle Elements (see attachment).
- c. **Exhibit G – Project Schedule Milestone Submittal (Page 5-30 through 5-32)**, deletion of item #6 (see attachment).



**4. Important RFP Reminders**

Deadline to submit questions has been extended through **Thursday, January 8, 2015 at 2:00 p.m. (local time)**.

Proposal due date has been extended from ~~Tuesday, January 20, 2015 at 2:00 p.m. (local time)~~ to **Tuesday, January 27, 2015 at 2:00 p.m. (local time)**.

**All other terms and conditions of the RFP will remain the same.**

Issued by:



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**Enclosures:**

- (1) Exhibit B – Statement of Work - Revised 1/7/15
- (2) Evaluation Criteria – Revised 1/7/15
- (3) Exhibit G – Project Schedule Milestone Submittal – Revised 1/7/15
- (4) Pre-Proposal Sign-in sheet and business cards
- (5) Pre-Proposal Agenda

# EXHIBIT B - STATEMENT OF WORK METRO BIKESHARE – REVISED 1/7/15

## INTRODUCTION

The Los Angeles County Transportation Authority (Metro) is inviting proposals from qualified proposers interested in providing equipment for implementation, installation, operation, marketing and maintenance of a Regional Bikeshare System. The system will be implemented in the phases.

### Initial Authorization

#### **Pilot: YEARS 1-2**

Phase I: Downtown Los Angeles Pilot with 65 stations/1,090 bikes (Attachment A).

This two-year phase includes 6 to 9 months of installation and up to 18 months of operations and maintenance (O&M). Contractors are encouraged to consider how the schedule can be expedited without sacrificing quality of service or system launch.

Contingent upon the success of Phase I: Downtown Los Angeles Pilot, funding availability and Metro Board authorization to proceed, Metro may authorize to: 1) extend Phase I O&M and/or 2) expand the Regional Bikeshare system in the following phases:

### Potential Subsequent Authorization

#### **Regional Expansion: YEARS 3-6**

##### Year 3

Phase II: Pasadena - 34 stations/490 bikes and O&M (Attachment B)

##### Year 4

Phase III: ~~Two~~ One Expansion Community – 65 stations/936 bikes and O&M (Attachment C)

##### Year 5

Phase IV: Two Expansion Cities/Communities - 53 stations/763 bikes and O&M (Attachment C)

##### Year 6

Phase V: Four ~~Three~~ Expansion Cities/Communities - 37 stations/533 bikes and O&M (Attachment C)

##### Year 7

Bikeshare System Phases I-V O&M

## BACKGROUND

The purpose of this solicitation is to select a Contractor team to provide equipment, implement, install, operate, maintain and publicize a network of publicly-available bicycles in a Regional Bikeshare System ("System").

The system shall provide a 24-hour, 365-day per year transportation network that complements other transit and transportation options; to increase multi-modal travel options in Los Angeles County (County); to be accessible to County residents, commuters, students, visitors and tourists alike; to encourage bicycle use as an environmentally friendly and congestion-reducing transportation option; to increase regional transit ridership by offering better connections to/from rail stations and bus stops in the County.

### **Regional Commitment to Increase Bike Modal Share**

Metro and the cities in Los Angeles County are making significant commitments to bicycling and other active transportation modes. Metro provides \$20 million a year for cities to implement bicycle and pedestrian projects such as bike lanes and paths in the County through the Call For Projects grant program. Bikeshare would capitalize on these investments. With the implementation of Measure R investments in rail infrastructure, 80% of the population in Los Angeles will be within biking distance of a rail station (3 miles or less). Metro and the cities in the County seek to partner to add Bikeshare to the growing list of transportation options in the region that connect to regional bus and rail transit in addition to serving local trips.

### **System Ownership and Regional Cooperation**

The Bikeshare System will operate under a publicly owned, privately operated model in which Metro owns the system equipment (including stations, bikes, and license to the operating software), while the Contractor operates the system, collects revenues for Metro (including membership fees and user fees) and receives compensation based on a monthly cost per bike including for O&M. The ridership data from the system will be owned by Metro and certain data will be available to the cities and the public 24/7 through a web portal. The system must be expandable within the County and ideally will be capable of an agreed upon level of regional interoperability with other systems in the County by the date of contract award. The Contractor shall also commit to work consistently with Metro and jurisdictions such as Santa Monica and Long Beach that may have a bikeshare system under a different operator to implement a cohesive regional system to the maximum extent feasible.

### **Funding**

Metro is committed to providing up to 50% of capital and up to 35% of operating and maintenance costs of a regional Bikeshare system. The cities and Metro have both committed to provide staff time to manage the contract implementation and promotion of the system. Metro's 50% contribution and the City of Los Angeles' 50% share for capital costs for Phase I: Downtown Los Angeles Pilot area will be covered by an Express Lanes Net Toll Revenue Re-Investment Grant awarded July 2014. The balance of the O&M costs after user fees and other revenues will be the responsibility of the host city through a Memorandum of Understanding with Metro. Advertising or sponsorship revenue shall not be considered or included in the Contractor's proposal. Advertising on the bikes, kiosks, or stations shall be covered under a separate solicitation.

### **User Fees**

The System user fee structure should encourage multiple short duration trips and provide ready access to residents, commuters, students, visitors and tourists. In order to accomplish these objectives, the System should have a minimum of one-hour, daily, weekly, and annual memberships with corresponding rates as well as corresponding low-income subsidized annual memberships and rates. It is also anticipated that an extended use fee should be charged to users after an initial free period of bicycle use. The pricing structure should be clear, straightforward, and well communicated to users. The pricing structure should also be reflective of Metro's goal to address first/last mile gaps and having Bikeshare be an integrated transportation service with bus and rail. The Contractor shall propose a system that utilizes existing Metro fare structure and TAP system as specified in the Statement of Work, Item D1 and further detailed in the Evaluation Criteria, Table 1, Required and Desired Bikeshare System Elements. The user fee structure shall be subject to Metro's final review and approval.

## **Launch Schedule**

Metro anticipates that the first phase of the system will “go live” preferably 6 months but no later than 9 months after a contract is executed. To this end, Metro encourages Contractor to consider how the schedule can be expedited without sacrificing quality of service or system launch. Metro shall inspect and approve each implementation phase prior to the launch. Contractor is responsible for adhering to respective local policies, permitting process and securing appropriate approvals before agreed upon system launch date. Before the “go live” date for the system the Contractor shall perform a Street Test of the System. The street test will assess all of the elements of the System, including but not limited to bicycles, locking mechanisms, stations, station power sources, cellular connectivity, server load, financial systems software and other support systems. At a minimum, the Street Test should comprise ~~five (5)~~ **ten (10)** stations each with a minimum of 10 System bicycles, equipment and operations. The Street Test should be in operation for two (2) months. In addition to the Street Test the contractor shall test each station and bicycle in the system prior to going live. The Contractor will be prohibited from commencing further equipment implementation of the System, bicycles and stations, until the Street Test and overall test is complete and identified problems are resolved to Metro’s sole satisfaction. The Contractor should anticipate completing all of the System elements necessary for commencement of the System prior to the “go-live” date.

The Contractor should also implement a preview month for annual/monthly members, where the first month of operations is open to members only. This preview month will promote monthly/annual membership signups and to conduct further quality assurance tests and refinements before opening the system to the public.

## **PROJECT DESCRIPTION/SCOPE OF WORK**

The selected Contractor shall provide equipment, implement, install, operate, maintain and market the first phase of an integrated Bikeshare with Metro and be technically and organizationally capable of expanding the system based on the phases proposed within Los Angeles County. The selected Contractor will purchase or manufacture all equipment necessary to implement the system, and to oversee all aspects of installation and conduct system operations, maintenance and repair, for the duration of the contract. Contractor shall be responsible for all of the following:

### **A. SYSTEM DEVELOPMENT, PROVIDE EQUIPMENT AND INSTALLATION**

1. System Ownership. Provide equipment, manufacture and set-up entire system (including installation) to become the property of Metro, including, without limitation, initial equipment and spare parts purchasing, software licensing, equipment and software upgrades, warranty repairs per product industry standards and replacement purchases. Provide industry standard warranties for all equipment.
2. Federal, State and Local Polices and Permits: Contractor is responsible for adhering to local policies, permitting process and securing appropriate approvals before agreed upon system launch date. The Contractor shall work with Metro to comply with Caltrans environmental documentation requirements as needed.
3. Test installation. Provide prototypes and system test. Identify and resolve problems and make improvements. Metro and Cities where stations are located shall inspect and approve each station implementation phase prior to the launch of new stations.

4. Launch. Plan and execute a timely and effective system launch according to the Section F Project Schedule milestones. Assist Metro's launch campaign to promote use of the new system, including branded identity as specified by Metro, provide market insight to assist development of communication strategy around launch, provide high resolution images of system components for use in promotional materials, conduct in-person on-site outreach at stations to encourage sign-ups and train new users.
5. Create e-commerce website and smart phone application for system sign-ups, payments and real-time station/bike location. ECommerce website and app must utilize 'adaptive design' and be accessible/usable on desktop computers, tablets, and mobile devices. ECommerce website must be ADA Section 508 compliant. Work with Metro ITS to ensure PPI/PPC security. Design, branding and language of Ecommerce website must be approved by Metro Communications. Provide regular reports of website traffic and activity to Metro. The website/app, branding, marketing and public relations will be developed in coordination with Metro and participating bikeshare cities. Metro will have final approval of all work product.
6. Provide data feed for integrating certain bike share information into *metro.net*, the Metro mobile applications, City's (where stations are located) websites and applications, and partner sites. The feed must include but may not be limited to the following fields for each station and/or bike: location name, street number, street name, city name, state, zip code, latitude coordinate and longitude coordinate. The feed will include two fields with real-time information including: 1) the available number of bikes at each station and 2) available number of docks for returning bikes at each station. The feed should include historical and live data for further research and policymaking support.
7. Advertising or sponsorship revenue shall not be considered or included in this Statement of Work.
8. Maintenance and Office Facility. Contractor shall provide one or more local maintenance storage and office spaces, as necessary, including provision of maintenance equipment and vehicles. Contractor is encouraged to purchase low or zero emissions vehicles and/or cargo bicycles for rebalancing.
9. Stations. Contractor shall build upon station site analysis performed by Metro and respective city for initially recommended locations. Contractor shall coordinate with Metro and local cities to confirm final suitability of station location. Contractor shall be responsible for securing all permitting for station locations and adhering to all permitting requirements and outlined by local cities.
10. Wireless System. The system should be wireless and solar/battery powered and shall not require wired connections for electrical or communication systems.
11. Bike/Station/Kiosk Ad Space. Metro requires the Contractor to provide space at kiosks, stations, on bicycles, and within electronic media (e.g. website, mobile app) for Metro to accommodate corporate messaging as part of an advertising and/or sponsorship program.
12. Ongoing promotion. Design and implement strategies for ongoing bikeshare system promotion to encourage increased ridership based on user trends, market insight and

knowledge gained from system operation. Assist Metro in implementing ongoing promotional activities by providing on-site outreach element of campaigns.

13. Station Locations. Preliminary bikeshare station locations as identified by Metro and respective jurisdiction is provided in location list and map Attachments A – C. The Contractor must receive final approval from Metro on the final locations. It is the cities responsibility to deliver final bikeshare-ready station locations to the Contractor including providing permits and any other necessary property entitlement. Note: Some or all station locations may be restricted by sponsor agreements, grants awards, and/or municipal requirements.
14. Repair of Damages. Repair or replace any sidewalks, street or other property that is damaged in the course of system installation, including Metro, respective city and/or privately owned property according to timely implementation described in Section E performance requirements.
15. **The Contractor shall ensure that stations are sited in conformance with ADA requirements in terms of sidewalk clearances and ingress and egress around stations. The contractor shall purchase one ADA accessible bike and keep it in storage. Upon request, the Contractor shall provide an ADA accessible bike to a bikeshare member within 24 hours.**

## **B. SYSTEM MAINTENANCE AND OPERATION**

Ongoing reporting, customer service, accounting, complaint resolution and legal issues associated with system.

1. Software Customization. Contractor shall customize software for tracking, reporting, customer comments and responses, and bicycle allocation as required. Contractor shall maintain and upgrade this software each year to accommodate service enhancements including, but not limited to, integration with Metro’s TAP card and future fare media changes and integration with other regional bike share systems. Yearly software upgrades shall be included in the monthly O&M costs.
2. Station Placement and Design. Contractor shall site stations under the advice and approval of Metro and the respective local city. Contractor shall create site plan drawings for station site kiosks that are required for permitting. Station site plan drawings must be approved by Metro, the respective local city, and/or the property owner prior to the request of a final installation permit. Metro has conducted detailed station siting analysis for Phase I and II. See Attachment A - C for all phase areas and suggested locations.
3. Reporting. Contractor shall submit monthly reports to include but not be limited to gross revenues, ridership, and expenses, in a format approved by Metro. At the end of each operating year, the Contractor will be required to submit a detailed income, utilization/ridership, and expense statement for the past year’s operation. Contractor shall provide a data portal through which Metro will also have access to generate reports as needed.
4. Open Data. The Contractor shall provide open content data that will allow third party developers to provide applications to assist users in finding bicycles, and stations, and

comparing travel and usage information consistent with reports from other US systems such as Chicago and Washington DC.

5. Response to Complaints. All System structures shall contain a conspicuously posted telephone number and web contact, to the Contractor's customer service operations to which the public may direct complaints and comments, and instructions for filing a complaint. The Contractor shall cooperate with Metro and respective local city in providing a response to any such complaints. The Contractor shall provide a shared database and software platform in which Metro can address complaints from the public, and in which the Contractor can report the resolution of such complaints.
6. Maintenance and Repair. System maintenance shall include, but is not limited to, inspecting, cleaning and removing graffiti and stickers from System structures, removal of debris in and around the System structures, preventive maintenance, inspection and repair or replacement of the system elements including but not limited to terminals, signs, bicycles, concrete or asphalt beneath stations, solar panels, website and software. The Contractor shall address maintenance and repair within the timelines specified in Section E performance requirements.
7. System Balancing. Monitor the location of each bicycle and the status of each dock and redistribute bicycles so that there are bikes and spaces available at each dock at all times.
8. Real-time Communication. Provide system to track bicycle and dock status and populate interactive map with status of bicycles at stations, station locations with optional address and directions, and transit information. Provide iOS and Android App with real time map updates.
9. The Bikeshare program shall require **"encourage"** the use of helmets while cycling. The Contractor shall provide options to purchase a Metro Bikeshare branded helmet at the time of initial membership purchase, or when changing or renewing an existing membership. ~~Contractor shall list stores that sell helmets on the Bikeshare website and shall provide a 10% or greater discount if a membership card is shown.~~ ***However,*** helmets shall be required for minors (per California law) in membership forms, safety tips on the web and at kiosks. Safety tips language shall state the following: "Always wear a helmet. Helmets dramatically reduce the risk of head injury in a bicycle crash. Riders under 18 are required by California Law to wear a helmet."  
  
**The Contractor shall work with Metro Destination Discounts group to contact bike retailers in the bikeshare system service area and identify ones who are willing to participate in a helmet discount program. Those retailers who participate will be promoted through the Destination Discounts page and through other Metro Bikeshare marketing efforts. See <http://www.metro.net/service/discounts/> for the program details. We anticipate that we will be able to identify at least one retailer, however; if no retailer is identified, Metro will explore other ways to encourage helmet use.** Additionally
10. Safety Information. Provide safety information to all customers on bicycle rules of the road including taking a lane, riding with traffic, hand signals, yielding to buses, where to find safe biking routes and other bicycle safety guidance. Provide basic safety and

bicycle wayfinding information at the kiosks and provide other information through collateral pieces to be made available to users.

11. Adaptive Website Design. Provide and display web pages correctly on all major web browsers and mobile devices/formats. Metro shall have final approval on all web/mobile media.
12. Branding, Marketing, Sponsor Fulfillment and Public Relations. Contractor will manage branding marketing and public relations in cooperation with Metro and cities, and work with respective city to fulfill all obligations of any grants, sponsorships, advertisers and/or donors including placement of corporate messaging as appropriate on bicycles stations or other locations. Metro shall have final approval of all material.
13. Performance Outcomes and Service Level Agreements. The Contractor must meet Performance Requirements as specified in Section E of this Statement of Work.
14. Liquidated Damages: In the event Contractor fails to meet the Project Schedule in Section F or the Performance Requirements in Section E, it must pay Metro the amount below according to the phase for every calendar day of delay.

Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7
Phase 1: DTLA Pilot +65 Stations & O&M (1.5 years)		Phase 2 Pasadena +34 Stations	Phase 3 +65 Stations	Phase 4 +53 Stations	Phase 5 +37 Stations	Full System O&M
\$2,510	\$2,842	\$3,173	\$4,038	\$6,846	\$9,703	\$10,839
FY15/16	FY16/17	FY17/18	FY18/19	FY19/20	FY20/21	FY21/22

In the event of such delay or failure, Metro shall notify Contractor in writing of any claim for liquidated damages. If Contractor does not correct the performance issue or delay and put the Project in compliance with the Performance Requirements and/or Project Schedule within ten (10) days receipt of the Metro notice, the liquidated damages shall begin to accrue until compliance is reached. Further, liquidated damages shall not accrue if the delay or failure is excusable and not caused by Contractor. Metro shall have the right to deduct any assessed liquidated damages from amounts otherwise due to Contractor.

15. Customer Service. Provide responsive customer services that promote repeat use including timely response to complaints as specified in Section E, Performance requirements.

**C. FINANCIAL OPERATIONS**

1. Registration. Provide and maintain in full operation a web page and iOS and Android smart phone applications to register, submit credit card data, and execute a user agreement. After registration, members should be able to immediately access a bike at any station. Membership of various durations (such as 30 minutes, hourly, daily, weekly, and/or monthly) shall be available.



2. Walk-Up Utilization. Allow one-time use by walk-up registration at all or designated stations. These stations shall enable walk-up renters to register, submit credit card data, and execute a user agreement.
3. Secure Financial Transactions. Complete secure financial transactions with data input at the web page or terminals. Provide the capability to track whether bicycles are returned during a specified period and accurately assess overtime fees. Financial data must be held securely in a manner that complies with e-commerce regulations, and only accessed by authorized personnel. The Contractor shall develop a security policy, ensure that its security policy is enforced, report any breaches to Metro and develop corrective plan to prevent future breaches. The method for protecting financial data, user names, and addresses, must be Payment Card Industry (PCI) compliant, follow industry standards for e-commerce sites.
4. Fee Collection. Accurately assess and collect fees for failure to return any bicycle within 24 hours or an established time period and clearly communicate rules to user.
5. Revenue. All revenues, including membership fees, user fees, and revenue from other sources, shall be collected by the Contractor on behalf of Metro. All revenue must be remitted to Metro. The Contractor shall be responsible for all revenue from the time it is collected until the time it is deposited to Metro's account.
6. Records. Contractor shall maintain records and make them available to Metro for inspection and auditing.
7. Billing and Compensation. The Contractor shall invoice monthly based on the cost of service, operation, maintenance and repairs. A 10% retention will be held until after the system is live, open to the public and fully operational for 3 months. The monthly cost will cover a reasonable number of station relocations per year (up to 5 for each phase development area). The monthly cost will also cover a reasonable number of station temporary moves (up to 10 for each phase development area) for special events like parades.
8. Regular Operations Review. Contractor shall conduct a tri-annual review of ridership; fees structure and development of recommendations that promote use of the system and reduce or eliminate any operating deficit. The findings of the review shall be published in a report and submitted to Metro on a quarterly basis.

#### **D. SYSTEM EXPANSION INTEROPERABILITY AND REGIONAL COORDINATION**

1. TAP System. Contractor shall coordinate with Metro and TAP to integrate the Bikeshare program with the Metro fare structure and TAP system as specified in Item D1 and further detailed in Table 1, Required and Desired Bikeshare System Elements of the Evaluation Criteria Section. Metro will communicate desired level of TAP integration upon notice to proceed issued to selected Contractor. The minimum integration required is capability to use a TAP card/number as a unique membership ID, access card or key fob with the option to increase integration with TAP software and or hardware in a phased approach as specified by Metro.
2. Expansion. Contractor must be able to expand the system within the County as specified in the full build-out of the system including all phases.

3. Cooperation and Interoperability. Contractor shall examine, plan for and implement ways to coordinate operations with proposed Bikeshare systems in Los Angeles County, including Long Beach and Santa Monica. Coordination efforts may include providing technical support through hardware and/or software modifications and may evolve over time.

**E. Performance Requirements**

Minimum service level requirements are outlined in the Table 1, Performance Requirements Chart.

**Table 1 - Performance Requirements Chart**

	Performance Indicator (PI)	Description	Measurement Tool	Maximum Threshold Criteria
PI-1	Overall system functionality	Combined total minutes that stations are out of service per week	Central computer database	30 minutes
PI-2	Bicycles in service (in working order)	Percentage of bicycles in service	Central computer database	97% of bicycles <b><i>(at all times)</i></b>
PI-3	Bicycle cleanliness	Percentage of bicycles that are clean and graffiti-free	Extrapolation from field checks by Metro staff	97% of Bicycles <b><i>(at all times)</i></b>
PI-4	Station cleanliness	Percentage of stations that are clean	Extrapolation from field checks by Metro staff	97%of stations <b><i>(at all times)</i></b>
PI-5	Graffiti, "scratch-itti," sticker removal from stations and bicycles	Time taken to remove graffiti, edging, and stickers, etc. after notification	Maintenance logs with photo	24 hours
PI-6	Bicycle distribution	Bicycle-to-dock ratio, total combined minutes stations are completely full or empty	Central Computer database	8 hours per day (system-wide)

	Performance Indicator (PI)	Description	Measurement Tool	Maximum Threshold Criteria
PI-7	Customer interaction	Timely response to customer complaints and resolution of issues.	User satisfaction survey, Complaint response logs	85% satisfied customers, 15-minute complaint response for time sensitive issues , 24-hr complaint resolution for all issues <b><u>(at all times)</u></b>
PI-8	Website in service	Percentage of time that the website is in service	Central computer database	100% <b><u>(at all times)</u></b>
PI-9	Central computer system in service	Percentage of time that the central computer system will be in service	Central computer database	100% <b><u>(at all times)</u></b>
PI-10	Peak Hours Bicycle Rebalancing	Bicycles shall be redistributed throughout the system as necessary to meet demand. The number of bicycles at any station during peak hours (peak hours being defined herein as 8 am to 8 pm Monday through Friday) shall not be completely full or completely empty. Liquidated damages shall not be assessed if the next closest station in any direction is not full or empty during the same period of time	Central computer database	Stations (or adjacent stations) were available 98% of the time during peak hours <b><u>(at all times)</u></b>
PI-11	Non-Peak Bicycle Rebalancing	Bicycles shall be redistributed throughout the system as necessary to meet demand. The number of bicycles at any station during non-peak hours (non-peak	Central computer database	Stations (or adjacent stations) were available 98% of the time during peak hours

	Performance Indicator (PI)	Description	Measurement Tool	Maximum Threshold Criteria
		hours being defined herein as 8:01 pm to 7:59 am Monday through Friday as well as Saturday and Sunday) completely full or completely empty		<b><u>(at all times)</u></b>

**F. Project Schedule—Milestones**

The Project Schedule shall be followed for phase I and all subsequent implementation/installation phases.

**Table 2 - Project Schedule Chart**

	<b>Milestone Description</b>	<b>Deliverables Required</b>	<b>Completion Time (Period Prior to “go live”)</b>
1	Initial organization and staffing plan development	Draft organization and staffing plan, Identify a POC staff person.	9 months
2	IT System Plan approval	IT System Plan	9 months
3	Beta test of central computer system	Beta test and demonstration of central computer system, database, and networks	9 months
4	Security Policy approval	Security Policy	9 months
5	Station siting plan development	Station sites selected by Contractor and submitted to Metro for approval	8 months
6	<del>Initiate system test of complete system at 10 stations</del>	<del>Deployment of system and bicycles at 10 stations for 2-month test</del>	<del>8 months</del>
7	Bicycle concept prototype delivery	Final prototype bicycle delivered to Metro	8 months
8	Station concept prototype development	Final prototype station delivered to Metro	8 months
9	Bicycle prototype development	Prototype bicycle submitted to Metro	7 months
10	Station prototype development	Prototype station (including docks, user interface, and complete functionality) submitted to Metro	7 months
11	User experience prototype development	Present station and “walk-through” of user interface to Metro	7 months
12	Initial development of website	Beta website for Metro review	7 months
13	Development of station siting plans	Detailed station site plans for each site	6 months
14	Initial development of promotions campaign	Draft promotions plan	5 months
15	Initial bicycle redistribution plan development	Draft bicycle redistribution plan	4 months
16	Initial system maintenance and cleaning plan	Draft bicycle and station maintenance and cleaning plan(s)	4 months

	<b>Milestone Description</b>	<b>Deliverables Required</b>	<b>Completion Time (Period Prior to “go live”)</b>
17	Final development of promotions campaign	Final promotions plan	4 months
18	Completed System Test	Fully operational and tested live complete website and system with 10 stations	4 months
19	Fully operational central computer system	Fully operational and tested live central computer system	4 months
20	Implementation of promotions campaign	Promotional campaign go-live	3 months
21	Fully operational database and central computer system	Fully operational and tested database and central computer system	3 months
22	Final bicycle redistribution plan development	Final bicycle redistribution plan	2 months
23	Final system maintenance and cleaning plan	Final bicycle and station maintenance and cleaning plans	2 months
24	Final organization and staffing plan development	Final organization and staffing plan	2 months
25	Fully operational accounts system in central computer system	Fully operational and tested accounts system in central computer database	2 months
26	Fully operational subscriptions section of website	Fully operational and tested live subscriptions page on website	2 months
27	Station delivery	All stations delivered for installation	40 days
28	Final bicycle delivery	All bicycles delivered	40 days
29	Implementation of bike redistribution plan	Fully staffed redistribution team and center location(s)	30 days
30	Implementation of organization and staffing plan	Fully staffed and operational back office functions	30 days
31	Implementation of system maintenance and cleaning plan	Fully staffed maintenance and IT team	30 days
32	All stations installed	All stations installed and fully operational	30 days



## **EVALUATION CRITERIA – REVISION #2 (DATED 1/7/15) METRO BIKESHARE**

Any proposals resulting from this RFP will be evaluated according to the evaluation criteria and associated weights. Sub-criteria are equally weighted.

Proposer's Expertise & Experience (30%):

- ***Documented the experience on similar projects including bikeshare, carshare, and/or other sharable transportation as it relates to partnering, working with and/or securing sponsors/sponsorships.***
- Documented experience on similar projects including bikeshare, carshare, and other sharable transportation service or technology in the last 10 years.
- Technical capabilities of prime and subcontractors based upon the resumes and experience narratives submitted.

Quality of Equipment & Software (25%):

- Reliability, quality of installation and equipment as demonstrated in existing systems in operation
- Capability to integrating mobile phone and other new technologies while being accessible to all mobile and web operating systems and platforms.
- Ability to meet all "required" elements listed in Table 1, Required and Desired Bikeshare System Elements

Regional Integration and Execution Plan (20%)

- Ability to integrate with other vendors' hardware and software

Innovation (10%):

- Operator meets minimum "required" elements per Table 1, Required and Desired Bikeshare System Elements
- Extent to which operator provides the "desired" elements per Table 1, Required and Desired Bikeshare System Elements

Cost (15%):

- The Cost Proposal shall include operating cost inclusive of maintenance, repair and lifecycle replacement of entire system and all components for the entire term of the agreement. The Cost Proposal will be factored into the Proposer's final evaluation score in the following manner:

$$\text{Proposer Cost Score} = \frac{\text{Lowest Cost Proposed}}{\text{Proposer's Cost}} \times 15\%$$



**Table 1  
Required and Desired Bikeshare System Elements**

**Item A – Station Elements**

<b>REQUIRED STATION ELEMENTS</b>
1. Compliance with the Americans with Disabilities Act, other state and local requirements, and requirements of the municipality, institution, and/or private landowner in positioning stations
2. If wireless internet connections are used, the system that is highly reliable and secure with encryption for financial data
3. Real-time communication between stations and headquarters particularly to report number of bikes per station and facilitate re-distribution
4. Capacity to install stations on public or private property, in a covered area, or outside
5. Capacity to convey safety information and laws affecting bicyclists at stations
6. Easily movable stations that: Require minimal time to install and/or remove, can be installed without trenching, when removed do not leave behind attachment points that could impede a vehicle or trip a pedestrian
7. Grid-free: doesn't need to connect to electrical grid (this may be accomplished by solar power or other types of alternative energy sources and wireless communication, as feasible)
8. Use of reliable alternative energy sources
9. Simple station user experience with multi-lingual operational instructions as specified by Metro per community needs. Minimum language provided shall be English, Spanish, Chinese, and Korean dialects
10. Encourage helmet use by providing information about helmet use on stations, kiosks, membership forms, and on the web. Safety tips language shall state the following: "Always wear a helmet. Helmets dramatically reduce the risk of head injury in a bicycle crash. Riders under 18 are required by California Law to wear a helmet."
<b>DESIRED STATION ELEMENTS</b>
1. Adequate space at each station for an illuminated map indicating both station locations and bicycle facilities;
2. Bike/Local area map at all stations (even if no illuminated map is provided)
3. Simple station user experience with multi-lingual operational instructions as specified by Metro per community needs exceeding the minimum languages
4. Capacity to maintain operation and security of the system during a power failure event or loss of internet connection
5. Capacity for station and major components (bicycle, hub, terminal) to self-report mechanical problems
6. Capacity for user to identify a bicycle as needing repair at the station
7. Smallest feasible footprint to enable installation in a space currently used as a parking space or on a wide sidewalk with a layout that minimally impedes pedestrian traffic and without horizontal components that could trip a pedestrian or injure a rider approaching a terminal at night

8. Aesthetic compatibility with streetscape and neighborhood context, both when terminal is full of bicycles and when it is empty
9. Unified look and feel of all stations within the network
10. Expected useful life and high durability of station and station components
11. Indicator showing whether the bicycle is available for use or out-of-service (such as when the system is shut down during an emergency or an individual bicycle has been identified as needing repair)
12. Capacity to issue reports to repair crews indicating where to rebalance and where bicycles needing repair are located (Example: the system could signal repair crews when terminals are within two bikes of being full/empty)
13. Ability to provide reliable power to illuminated panels
14. Ability to employ a backup power source
15. Ability to modify or design the system components (bikes, terminal, hub, and/or sign) to address issues specific to the Metro system and the Los Angeles region (Example: climate, vandalism, customization)
16. Provision of retail customer services offering customer registration, helmet sales/rental, interoperability/transfers of bicycles between local bikeshare and transit systems
17. Ability to accept bicycle returns on behalf of other regional bikeshare operators
18. Capacity to add lighting where necessary to facilitate nighttime use of terminal and adjustment of bicycles and to reduce vandalism
19. Capacity to add emergency call buttons, preferably using wireless technology
20. Capacity for users to choose alternative bicycle types

### Item B: Bicycle Elements

<b>REQUIRED BICYCLE ELEMENTS</b>
1. Lighting and reflector system (include rear and front light and meeting California Vehicle code requirements for bicycles ridden at night)
2. Puncture resistant tires
3. Reliable and intuitive braking system
4. One size to fit majority of adult population with seat-only adjustment
5. Theft and tamper resistant (potentially through use of components not compatible with other bicycles and/or requiring tools not commonly available)
6. Cargo capacity for items such as a typical briefcase, book bag, and/or grocery bag weighing up to twenty pounds
7. Equipped with GPS tracking devices or equivalent
8. Bike with a chain-guard, internal hub, and multiple gears (3 or more)
9. Ability to produce bicycles pursuant to 6 to 9 month implementation schedule requirements listed in the SOW schedule

<b>DESIRED BICYCLE ELEMENTS</b>
1. Protection from grease, dirt, and tire spray including enclosed drive train and full fenders
2. Pedal-powered front/rear lighting system
3. Corrosion resistant material with rust-proof external parts
4. Additional cargo capacity on some or all of fleet
5. Chainless bike
6. Equipped with secondary lock to enable user to secure bike to any bike rack or post while making a quick stop
7. Light weight (less than 35 pounds)
8. Capacity for sponsorship or advertising that can be easily changed on the wheels, cargo space (example: basket), and other areas. Capacity for permanent/semi- permanent sponsorship/branding with decals or paint on the fenders, the frame, the rack or other parts of the bike
9. Front, rear, and side reflectors; lighting exceeding California Vehicle Code requirements
10. Comfortable seat with an upright riding position allowing for confident riding in traffic
11. Easy to operate: easy to mount and to hold in stopped position, including for shorter rider
12. Kickstand or other device to allow the bicycle to be supported upright
13. Record of reliable operation under similar regional bikeshare system conditions
14. Easily adjustable seat that resists movement after adjustment
15. Equipped with sensors on bikes to diagnose and self-report mechanical problems
16. Ability to "dock" and communicate with system outside the service area at stations provided by others
17. At least two colors of powder coating on each bike
<b>18. <u>Electric or electric-assist bicycles included in the system fleet.</u></b>

**Item C: Terminal Elements**

<b>REQUIRED TERMINAL ELEMENTS</b>
1. A minimum of 10 terminals in system accept walk-up renters with agreement to liability waiver. If not all stations accept walk-up renters, explain how the system will accommodate first or one-time users
2. Data security, particularly for financial data, user names, and addresses
3. Clear and prominent instructions at each terminal explaining the pricing structure and use of the system
4. Clear and prominent instructions at each terminal directing users to the contractor's helpline and website when they need technical assistance or have complaints.

5. A process for situations in which a user wants to return a bike to a terminal that is full or rent a bike from a terminal that is empty
6. Multi-lingual as specified by Metro per community needs. Minimum language provided shall be English, Spanish, Chinese, and Korean dialects
7. Capacity for advance registration that avoids need for registration at each station
8. Ability to integrate with the TAP fare collection system to create a seamless user experience and/or integrate bikeshare into the Metro transit system as a transfer service
<b>DESIRED TERMINAL ELEMENTS</b>
1. Automatic confirmation that member's credit card is valid and has sufficient funds to cover charges if bicycle is not returned, preferably before each bicycle is removed
2. Touch-screen
3. Ability to allow members of other regional Bikeshare systems to access this system with the same card
4. Ability to integrate Bikeshare subscription with Metro's fare structure
5. Flexibility to add features and modify terminal as needed
6. Ability to sign up to become annual members or to upgrade day- or week-memberships to annual memberships at some or all terminals
7. Flexibility to be reprogrammed to serve as a registration station for potential future automated scooter-share, e-bikeshare, or car-share system and/or facilitate transactions related to electric charging
8. Ability to limit the number of subscriptions and walk-up rentals that can be purchased by one user or using one credit card
9. Ability to partner with Metro and/or outside non-profit agency to create a Bikeshare Rider Relief program that would facilitate discounted memberships to the unbanked or low-income populations. Program may be integrated with existing Metro Rider Relief program <a href="http://www.metro.net/projects/rider_relief/">http://www.metro.net/projects/rider_relief/</a>

#### Item D: Dock Elements

<b>REQUIRED DOCK ELEMENTS</b>
1. Modular design of docks, meaning the ability of the station design to accommodate a flexible number of bicycle storage and rental slots and therefore the ability to adjust capacity through the life of the station after initial construction
2. Vandal and theft-proof connection between dock and bike
3. Useful life is five years (lifecycle replacement over contract term is required)
<b>DESIRED DOCK ELEMENTS</b>
1. Ability to self-report mechanical problems
2. Useful life greater than five years
3. Twice as many docks as bicycles in the whole system
4. Ability to receive bicycles from regional Bikeshare providers

### Item E: Technology & Website Elements

<b>REQUIRED TECHNOLOGY &amp; WEBSITE ELEMENTS</b>
1. Data security, especially for financial data, user names, and addresses, that is Payment Card Industry (PCI) compliant and that satisfies minimum specifications of the municipality, institution, and/or private landowner
2. A mechanism for users to report problems and make suggestions for system improvement
3. Real-time communication with stations and bicycles to track bicycle and dock status
4. Capacity to provide safety information
5. Access to all registration and travel data with regular reports provided to the City
6. System to immediately aid users with mechanical issues and/or injuries
7. Ability for website to accept and/or allow user to change annual subscriptions
8. Interactive map showing real-time status of bicycles at stations, station locations with optional address and directions, and transit information
9. Ability to work and display pages correctly on all major web browsers and mobile devices
10. Capacity for user to track number of available bikes and open docking points in each terminal via webpage and mobile device
11. Phone contact information prominent on website
12. Ability to provide basic safety information
13. Provide open content data to allow third party developers to provide applications
14. Ability and plan to integrate the bikeshare fare structure with the existing Metro fare structure.
15. The website shall feature information illustrating that the Bikeshare program strongly encourages the use of a helmet while cycling. Additionally, helmets shall be encouraged and required for minors (per California law) in membership forms, safety tips on the web and at kiosks. Safety tips language shall state the following: "Always wear a helmet. Helmets dramatically reduce the risk of head injury in a bicycle crash. Riders under 18 are required by California Law to wear a helmet."
<b>DESIRED TECHNOLOGY &amp; WEBSITE ELEMENTS</b>
1. Capacity to convey additional bicycle safety information, laws, and/or warnings affecting bicyclists (Ex: Brief safety and "rules of the road" video and interactive test)
2. Language options, particularly Spanish, Korean and Chinese on all webpages
3. Ability to collect survey information and customer satisfaction ratings
4. State-of-the-art features
5. Ability to provide data to outside application developers

6. Ability to provide system reports in a format consistent with leading US Bikeshare systems
7. Ability of Bikeshare backend technology to integrate with Metro BikeHub secure bike parking facilities which may include; fare payment, user membership accounts and membership/user ID's. Annual ITS software maintenance package to provide updates to integrate with future Metro Bike infrastructure
8. Personalized customer web pages that provide information such as miles traveled, calories burned, etc.

Item F: Interoperability Vision Elements

<b>REQUIRED INTEROPERABILITY VISION ELEMENTS</b>
1. Sharing membership and usage data with other Bikeshare systems that might operate within the region
2. A mechanism for providing reciprocal membership privileges such that members of another Bikeshare system that might operate within the region can use the Metro System and vice-versa
3. Ability to expand the system to other Cities in LA County under the terms offered to Metro and the City of LA
<b>DESIRED INTEROPERABILITY VISION ELEMENTS</b>
1. A mechanism for tracking the bikes belonging to each system and an ability to coordinate rebalancing across multiple systems
2. A mechanism for reporting on memberships and usage data from multiple systems, both to users and to the City and any other municipality, institution, and/or private landowner that might participate in the system or systems
3. A method for providing integrated account information to the users of any Bikeshare system that might operate within the region about their activities on all Bikeshare systems that might operate within the region, including the Metro System (e.g., memberships, usage fees paid, distance traveled, calories burned, number of checkouts, etc.)
4. A mechanism that allows bikes from another system that might operate within the region to physically dock at Metro stations and for Metro System bikes to dock at other stations
5. Ability to accept bicycle returns from other systems in the region at some locations
6. Ability to provide information on websites and stations that identifies the location of Bikeshare stations belonging to other Bikeshare systems that might operate within the region as well as those belonging to the Metro Bikeshare System

PROPOSER: \_\_\_\_\_

**EXHIBIT G – PROJECT SCHEDULE MILESTONE SUBMITTAL – REVISED 1/7/15**

The Project Schedule shall be followed for phase I and all subsequent implementation and installation phases. Proposer shall respond if it can meet or improve the schedule below and include a customized and more.

Project Schedule Chart

	<b>Milestone Description</b>	<b>Deliverables Required</b>	<b>Completion Time (Period Prior to “go live”)</b>	<b>Meets or Improves</b>
1	Initial organization and staffing plan development	Draft organization and staffing plan, Identify a POC staff person.	9 months	
2	IT System Plan approval	IT System Plan	9 months	
3	Beta test of central computer system	Beta test and demonstration of central computer system, database, and networks	9 months	
4	Security Policy approval	Security Policy	9 months	
5	Station siting plan development	Station sites selected by Contractor and submitted to Metro for approval	8 months	
<b>6</b>	<b>Initiate system test of complete system at 10 stations</b>	<b>Deployment of system and bicycles at 10 stations for 2-month test</b>	<b>8 months</b>	
7	Bicycle concept prototype delivery	Final prototype bicycle delivered to Metro	8 months	
8	Station concept prototype development	Final prototype station delivered to Metro	8 months	
9	Bicycle prototype development	Prototype bicycle submitted to Metro	7 months	
10	Station prototype development	Prototype station (including docks, user interface, and complete functionality) submitted to Metro.	7 months	

	<b>Milestone Description</b>	<b>Deliverables Required</b>	<b>Completion Time (Period Prior to “go live”)</b>	<b>Meets or Improves</b>
11	User experience prototype development	Present station and “walk-through” of user interface to Metro	7 months	
12	Initial development of website	Beta website for Metro review	7 months	
13	Development of station siting plans	Detailed station site plans for each site	6 months	
14	Initial development of promotions campaign	Draft promotions plan	5 months	
15	Initial bicycle redistribution plan development	Draft bicycle redistribution plan	4 months	
16	Initial system maintenance and cleaning plan	Draft bicycle and station maintenance and cleaning plan(s)	4 months	
17	Final development of promotions campaign	Final promotions plan	4 months	
18	Completed System Test	Fully operational and tested live complete website and system with 10 stations	4 months	
19	Fully operational central computer system	Fully operational and tested live central computer system	4 months	
20	Implementation of promotions campaign	Promotional campaign go-live	3 months	
21	Fully operational database and central computer system	Fully operational and tested database and central computer system	3 months	
22	Final bicycle redistribution plan development	Final bicycle redistribution plan	2 months	
23	Final system maintenance and cleaning plan	Final bicycle and station maintenance and cleaning plans	2 months	
24	Final organization and staffing plan development	Final organization and staffing plan	2 months	



	<b>Milestone Description</b>	<b>Deliverables Required</b>	<b>Completion Time (Period Prior to “go live”)</b>	<b>Meets or Improves</b>
25	Fully operational accounts system in central computer system	Fully operational and tested accounts system in central computer database	2 months	
26	Fully operational subscriptions section of website	Fully operational and tested live subscriptions page on website	2 months	
27	Station delivery	All stations delivered for installation	40 days	
28	Final bicycle delivery	All bicycles delivered	40 days	
29	Implementation of bike redistribution plan	Fully staffed redistribution team and center location(s)	30 days	
30	Implementation of organization and staffing plan	Fully staffed and operational back office functions	30 days	
31	Implementation of system maintenance and cleaning plan	Fully staffed maintenance and IT team	30 days	
32	All stations installed	All stations installed and fully operational	30 days	

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**LA Metro  
Pre-Proposal Conference Sign In Sheet  
RFP No. PS11357, Metro Bikeshare  
Tuesday, January 6, 2015, 9:30 a.m.**

	Attendee	Company	Street Address	City	State	Zip	Phone	Email	Prime	Sub	DBE
1	FRANCOIS NION	JCDecaux	1150 S. Olive	LA	CA	90015	213-608-0910	FRANCOIS.NION@JCDECAUXNA.COM			
2	Prof Desai	Bewegen Technologies	7015 8th Ave	St-Georges	QC	G6A-1A1	514-348-4926	Prate@Bewegen.com	✓		
3	Alex Perez	Phelps Total mkt	901 W. Lashine Blvd	Santa Monica	CA	90404	310-752-4500	alex@phelpstotalmarket.com		X	
4	G.C. Crivello	PBSC	1100 Marie-Victorin	MONTRÉAL	QA	J4G 2H9	(514) 449-6358	gcrivello@pbseurbanmobility.com			
5	Joel Mulligan	Gobike A/S	Fredericisingade 15	COPENHAGEN	DA	2000	+45 6145 2329	itm@gobike.com			
6	Derek Fretheim	Bike Nation	15271 Barranca Pkwy	Irvine	CA	92618	949-371-9471	d.fretheim@bikenationusa.com			
7	Josh Squire	Cyclehop	604 Arroyo Ave	Santa Monica	CA	90401	773-251-9757	Josh@cyclehop.com	✓		
8	Lawent HENERT	STOOVE	65, Imp de 3 points	MONTRÉAL	QC	H3T 1R0	+336 07034447	l.henert@stooove.com	✓		
9	CLAIKE HURLEY	B-Cycle	301 W Madison St	WATERLOO	WI	53594	608 772 1120	churley@bicycle.com	✓		
10	LARRY BROWN	ALLEGRA CONSULTING	20 E. Colorado Blvd	PASADENA	CA	91105	626-408-4848	SUZANNE@ALLEGRA.COM		✓	✓
11	SUZANNE MADISON	ALLEGRA CONSULTING	20 E. Colorado Blvd	PASADENA	CA	91105	626-408-4848	SUZANNE@ALLEGRACONSULTING.COM			✓
12	Gene W	Bike Hub	1522 Park St	Alameda	CA	94501	510-205-3006	gene@bikehub.com		X	X
13	David St-Pierre	8D Technologies	Maisonneuve Montreal	Montreal	QC		514-913-6792	dstpierre@8d.com		X	
14	ADAM SHAPIRO	BIKE HUB	1522 Park St	ALAMEDA	CA	94501	510-549-9009	adam@bikehub.com		X	
15	Danny Quarnell	Bicycle Transit Systems	1542N Arroyo Parks	Portland	OR	97217	503-750-6906	dquarnell@bicycletransit.com		X	
16	Justin Ginsburgh	Alta	5202 3rd Ave	Brooklyn	NY	11220	917-723-9259	justinginsburgh@altabicycleshare.com			
17	Alex Vickers	Alta	5202 3rd Ave	Brooklyn	NY	11220		alex.vickers@altabicycleshare.com			
18	Brett Hondorp	Alta Planning + Design	100 Webster St.	Oakland	CA	94617	510 540-5008	bhondorp@altaplanning.com		X	
19	JAMIRA BETHINKAN	METRO									
20	Fong-Ping Lee	FPL	10 Corporate Park	Irvine	CA	92606	949-252-1688	fp Lee@fplandassociates.com			X
21	Irene Lee	FPL	Suite 310	"	"	"	"	irene.lee@fplandassociates.com			X
22	Regina Talamante	RT Engineering + ASSOC	1851 E First Street	Santa Ana	CA	92705	714 619 9301	regina@rtengineering.com			X
23	Karen Gordon	NEXTBIKE	48 W 5th Ave	San Mateo	CA	94402	415-632-8790	Karen@nextbikeinc.com			



**METRO**

**Pre-Proposal Conference Agenda  
RFP No. PS11357  
Metro Bikeshare**

**Tuesday, January 6, 2015, 9:30 a.m.**

**Union Station Conference Room, 3rd Floor**

**SIGN-IN/INTRODUCTIONS**

Lily Lopez  
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Risk Management

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**STATEMENT OF WORK OVERVIEW**

Avital Shavit  
Project Manager

**QUESTIONS & ANSWERS**

All

**Note: Proposers are invited to submit questions on the Question Sheet provided at the Pre-Proposal Conference or email them directly to [lopezlil@metro.net](mailto:lopezlil@metro.net). All proposers are advised that any exchange between Metro in response to prospective Proposers at the Pre-Proposal Conference are for clarification purposes only and does not qualify or amend the RFP document. The RFP document shall govern if there are any conflicts between the information provided at the Pre-Proposal Conference and the RFP document unless amended in writing.**