

REQUEST FOR PROPOSALS

Casco Bay Island Transit District in Portland, Maine

Project Number: RFP # 101-2019

I. PROJECT OVERVIEW.

Casco Bay Island Transit District ("Casco Bay Lines") is seeking proposals for a turnkey ticketing system, including software and all required hardware, to utilize at its Casco Bay Ferry Terminal located at 56 Commercial Street. (See Exhibit A for detailed Concept of Operation). This project is being financed with funding from the Federal Transit Administration (FTA) with matching funds from Casco Bay Lines. This project is subject to all applicable federal and state laws, policies and procedures.

All Proposers must provide a technical proposal and a separate sealed price proposal. **No mention of price shall be included in the technical proposal**, otherwise, that proposal shall be rejected in its entirety.

A. RFP Timeline:

Date of Posting.....November 19, 2018
 Questions/Clarifications Due.....December 3, 2018 (3:00 pm EST)
 Answers to Questions Posted..... December 7, 2018
 Proposals Due.....December 28, 2018 (3:00 pm EST)
 Review Proposals.....January 2 – January 11, 2019
 Vendor Demonstrations (if necessary)...January 14 – January 18, 2019
 Final Selection Made.....February 1, 2019

B. Communications:

All communication about this RFP shall be in writing and sent by email to the attention of:

Name: Jonathan Greven

Title: Director of Finance and HR

Email: jonathang@cascobaylines.com

Casco Bay Lines, in accordance with the provisions of Title VI of the Civil Rights Act of 1964 (78 Stat. 252, 42 U.S.C. §§ 2000d to 2000d-4) and the accompanying Regulations, hereby notifies all Proposers that it will affirmatively ensure that any contract entered into pursuant to this advertisement, will afford disadvantaged business enterprises full opportunity to submit proposals in response to this invitation and will not discriminate against any proposer on the grounds of race, color, or national origin in consideration for an award.

II. GENERAL INFORMATION

- A. This RFP does not commit **Casco Bay Lines** to pay any of the costs you incur in submitting your proposal, preparing the proposal, or in procuring or sub-contracting for services or supplies related to the proposal.
- B. The Proposer needs to understand and comply with the flow down provisions outlined in each of the applicable FTA clauses (Exhibit C) as they relate to sub-consultants and service firms that may perform services in completion of this project.

- C. During the proposal preparation period, all **Requests for Clarification** shall be submitted in writing.
1. Email to: jonathang@cascobaylines.com
 2. Email subject line: "Request for Clarification to Ticketing System RFP"
 3. Question deadline: December 3, 2018 3:00 PM. Late requests for clarification will not be accepted.
 4. When appropriate, responses to requests, as well as any changes initiated by Casco Bay Lines, will be provided to all prospective proposers in writing as amendments to the RFP.
- D. It will be the Proposer's responsibility to register with Casco Bay Lines (via e-mail) of intent to submit a proposal as well as check the Casco Bay Lines' website for responses to the Requests for Clarifications and/or RFP amendments.

III. PROPOSAL INFORMATION CHECKLIST

Organization & Format: Your proposal should include the documents listed below and be organized as closely as possible to the format and sequence indicated in these instructions.

- A. **Cover Letter:** (up to 2 pages),
- B. **Contact Information:** Please provide the name, address, phone number and e-mail address of the proposer.
- C. **Experience:** Please describe the firm's experience and capabilities in deploying ticketing software systems. Identify projects, clients, dates and results.
- D. **Qualification and Resumes:** Please identify the staff the firm will assign to fulfill the contract requirements, including but not limited to the project manager, project engineers, customer representative, technicians and any sub-contractors. Provide résumés describing the education and experience of those staff.
- E. **References:** Please provide a list of 3 to 5 clients with which the firm has done business similar to that required in this solicitation in the last 5 years. Include points of contact and a brief description of each project. Casco Bay Lines will determine which if any references are contacted. The results of any reference checks will be used to help score the proposal.
- F. **Project Approach:** Please describe the firm's approach to meeting the requirements, defined by Casco Bay Lines in Section VI, in relation to our current practices and constraints as described in the Concept of Operation (Exhibit A) document. Also provide any customization of your product that will be required to meet the needs of Casco Bay Lines. If detailed answers are provided in the Appendix A Questionnaire described below, make reference to those answers in this section of your proposal to limit redundancy of information. Suggestions for operational changes that might make better use of your product off-the-shelf are encouraged but may not be accepted due to laws, regulations or other operational constraints.
- G. **Proposed Project Timeline:** Please include a schedule outlining project timeline and deliverables.

- H. **Completed Questionnaire (APPENDIX A):** Please answer the questions as succinctly as possible. If attachments are used to answer questions, site the attachment name and where it can be found within the proposal in the answer box for that question.
- I. **Completed Requirements Matrix (APPENDIX B):** This table will summarize your ability to meet the requirements in Section VI. Please include the proposal page number that describes how the requirement will be met (either in the Project Approach section or Appendix A).
- J. **Completed Price Proposal Form (APPENDIX C):** - The price proposal shall be provided on the attached form (Exhibit C) printed on 8.5" x 14" paper and placed in a separately sealed envelope. Prices shall be outlined for all required items. Do not include your price proposal on the same USB drive as your electronic submission.
- K. **All required signature sheets (APPENDICES D, E, F, G, H)**
- L. **Sample Contract:** Please provide a sample contract executed by your firm for other projects.

IV. FILE FORMAT & DELIVERY

The entire RFP package shall be submitted as outlined below:

- A. **Electronic Format:** Electronic submissions should on USB drive. PDF electronic format is preferred.
- B. **Hard Copy Format:** Four (4) bound hard copies of the technical proposal and four (4) separately sealed price proposals. Limit proposal content to the documents described in Section III of this RFP.
- C. **Proposals shall be delivered as follows:** An electronic submission and four (4) bound hard copies.

ATTENTION:

Jonathan Greven
Casco Bay Lines
P.O. Box 4656
56 Commercial Street
Portland, Maine 04112

Note: Any proposal, portion of a proposal, or unrequested revision received after the time and date specified in Section I.A of this RFP will be returned unopened.

V. CONTRACT TERM

The initial contract term shall be for a period of up to 5 years. At Casco Bay Lines' discretion, the contract may be extended as appropriate. The contract type used for this project shall use general terms and conditions developed by Casco Bay Lines and shall incorporate the selected proposers negotiated price conditions as part of the contract terms. Additional terms may be agreed to as part of final negotiations as long as they do not adversely impact requirements or limitations of the funding agencies.

VI. GENERAL SYSTEM REQUIREMENTS

The minimum requirements for the ticketing system Casco Bay Lines seeks to deploy are included in Appendix B – Requirements Matrix. Sections A.-D of the Requirements Matrix are essential requirements. Requirements listed in Section E. are desirable and will be deployed immediately if an acceptable solution is proposed. Section F. includes optional components, which may (or may not) be deployed immediately or over the next 5 years. The “Project Approach” section of your proposal and your answers to Appendix A – Proposer Questionnaire should address how your firm can meet each requirement. Please fill-in the Requirements Matrix with reference to the proposal page number on which the requirement is discussed and include a notation of (Y)es, (N)o, or (C)ustomization Required to meet the requirement.

VII. PROJECT DELIVERABLES

The components of the project shall include (but not be limited to) the deliverables listed below. The deliverables list below excludes those requirements defined in Section VI. above as “desirable” and “optional.” If it is determined, during the evaluation and negotiation process, that Casco Bay Lines will benefit from adding additional functionality to the base system then the deliverables list will be expanded as part of the contract with the chosen vendor.

- A. Project Management Plan
- B. Project Timeline with Milestones and Deliverables
- C. System Configuration
- D. System Configuration Documentation
- E. Data Conversion (where applicable)
- F. System implementation
- G. Onsite Staff Training
- H. Additional Online or Remote Training
- I. Training Materials
- J. System Architecture Diagram
- K. Ticketing System Software (For sale of paper tickets & freight bill of lading at terminal)
- L. All hardware needed for a turnkey project including (but not limited to):
 - 1. Four (4) Ticket Window POS Stations
 - 2. Two (2) Freight Window POS Stations
 - 3. Two (2) Roaming Agent POS Stations
 - 4. Two (2) Onboard Food, Beverage & Merchandise POS Stations
 - 5. Printers for all Workstations
 - 6. Credit Card Scanners for All Workstations
 - 7. Barcode (or other) Scanners for all Workstations
 - 8. Ticket Validation Technology for use while embarking vessels
 - 9. Indoor Self-Serve Kiosk(s) (Quantity to be determined)
 - 10. All required software servers and network hardware (if applicable)

VIII. RATING AND SELECTION PROCESS

CBITD will award a contract for a new Ticketing System to the responsible offeror whose proposal is most advantageous and offers the **Best Value** to CBITD after price and other factors are considered.

- A. **Selection Criteria:** Proposals will be reviewed and rated based on the responses included in the documentation outlined in Sections III of this RFP, as follows:

1. Project Approach and ability to meet functional & technical requirements (50 max pts.)
 2. Qualifications & experience (20 max pts.)
 3. Proposed implementation timeline (20 max pts.)
 4. Total cost of project (10 max pts.)
- B. **Short List:** After the review of technical proposals, the price proposals will be opened and combined with the technical proposals to generate a short list of proposers.
- C. **Interviews & Demonstrations:** Casco Bay Lines reserves the right to interview as many or as few proposers as necessary to determine the highest-ranked proposals. Casco Bay Lines also reserves the right to conduct no interviews at all.
- D. **Best & Final Offer:** After interviews, proposals will be re-assessed. The top scoring firm(s) may be asked to submit their best and final offer (BAFO) and final negotiations will begin.
- E. **Process Conclusion:** If negotiations do not result in a final agreement with the selected proposer, negotiations will cease, and the selected proposer will be removed from further consideration. CBL will then move on to the second highest proposer for further negotiations. This process will continue until an agreement is reached or all proposers have been eliminated.

Casco Bay Lines reserves the right to accept or reject any or all offers, cancel the request for proposals and issue another request for proposals, whichever is in the best interest of Casco Bay Lines

IX. LIST OF ATTACHMENTS

- A. **EXHIBITS:** All exhibits must be carefully read and considered when completing this RFP.
1. EXHIBIT A – Concept of Operations (PDF)
 2. EXHIBIT B – Protest Procedures (PDF)
 3. EXHIBIT C – FTA Required Procurement Clauses (PDF)
 4. EXHIBIT D – CBL Tariff Documentation (PDF)
 5. EXHIBIT E – Munis File Layout Specifications (PDF)
- B. **APPENDICES:** All appendices must be filled-in as completely as possible and included with the proposal. If additional space is required for the PRICE PROPOSAL use Price Proposal Page 2 (2nd tab) and carry the total over to page 1.
1. APPENDIX A – Vendor Questionnaire (Word Doc)
 2. APPENDIX B – Requirements Matrix (Excel)
 3. APPENDIX C – Price Proposal Form (Excel)
 6. APPENDIX D – Acknowledgement of FTA Clauses (PDF)
 7. APPENDIX E – Anti-Lobbying Form (PDF)
 8. APPENDIX F – Buy America Certification (PDF)
 9. APPENDIX G – DBE Utilization Form (PDF)
 10. APPENDIX H – Certification to Truth & Accuracy of Submitted Proposal (PDF)

