Addendum No. 1

TO: **All Vendors**

FROM: **Jason M. McGarry, Procurement/Contracts Administrator**

SUBJECT: **CARTA2017-04 – Farebox Management System**

DATE: **February 9, 2017**

This Addendum No. 1 modifies the Request for Proposal (RFP) only in the manner and to the extent as stated herein.

QUESTIONS AND ANSWERS

1. Is it possible to get a time extension to submit such as two (2) weeks?
   a. **No, the due date will remain on February 17, 2017**

2. Would you accept to consider alternative and modern approach as a replacement / equivalent (and effectively an upgrade) for some items that you have specified in your request for proposal?
   a. **Yes.**

3. Chapter 1.0, Section E, Confidential Information, page 6, states "CARTA shall not in any way be liable or responsible to any Bidder or other person for any disclosure of any such records or portions thereof, whether the disclosure ... occurs through inadvertence, mistake, or negligence on the part of CARTA." The following paragraph states, "CARTA further hereby disclaims any responsibility for any information which is disclosed as a result of Offerors such independent determination of confidentiality or exemption necessitated by the Offerors failure to properly follow this section." The first sentence says CARTA is not responsible for disclosure of confidential information under any circumstances; the second suggests it is not responsible only if Contractor fails to specify what information is confidential. We respectfully suggest the latter is the more reasonable policy and request that the first sentence be deleted.
   a. **First sentence will be removed.**

4. In Chapter 2.0, Section H, Equipment and Services to Be Provided, Required Special Testing, page 12, there is a requirement for a "System Integration and Pilot Test." System integration tests typically are conducted in a lab environment at the Contractor's plant. Pilot tests usually are conducted in the field at the agency. Since the Contractor is required to have staff on hand for this test, please clarify where the System Integration and Pilot Tests are to be conducted and how long it will last.
   a. **They will be conducted at 3664 Leeds Avenue North Charleston, SC 29405 and will last until all issues (if any) are resolved.**

5. Chapter 2.0, Section X, Data Collection and Reporting System, page 45, says: "A global positioning system (GPS) will be provided that is capable of processing raw geographic data (latitude/longitude coordinates) into a form suitable for transit use, e.g., bus stop number." Are we correct in assuming the GPS system is to be provided by a third party?
   a. **Yes.**

6. Chapter 2.5 on page 52 describes requirements for phase 2. Section C on page 53 says "CARTA would like to have a cloud based portal developed in the future." Please clarify the status of phase 2 items – are they optional? When are they to be provided?
   a. **Yes, they are optional and will be provided when a funding source is determined.**

7. In Chapter 3.0, page 53, Section A provides general proposal requirements, including a 40 page limit. Section B indicates requirements for the technical proposal and Section C gives requirements for the cost proposal. Are the technical proposal and cost proposal two separately packaged documents? Does the 40 page limit apply to the technical proposal only or to the technical and cost proposal combined? Do the bid sheet and other proposal forms count toward the page limit?
   a. **Please use the 40 page limit as a guideline. You may go over if necessary.**

8. Section B, Requirements for Technical Proposal, page 53, refers to tabs 1 through 9 but provide no description of tabs 7 and 9. What are these tabs for?
   a. **Typo, please follow the format as 1-7**

9. Section C, Requirements for Cost Proposal, page 54 indicates a requirement for two (2) cashboxes per farebox. The Price Schedule on page 72 indicates one (1) cashbox per farebox. The recommended practice is one cashbox per farebox plus spares if desired. Please clarify how many cashboxes should be provided.
   a. **One per farebox with spares.**

10. The Price Schedule on page 72 does not list all required RFP items, including revenue collection vaults (page 8), the mobile ticketing application (page 25), documentation (page 49), maintenance test stands (page 51), and phase 2 items (pages 52-53). We respectfully request a revised Price Schedule so that Contractors will clearly know what items to bid. In addition, please clarify whether mobile ticketing is optional or part of the base bid.
    a. **Please see attached Price Form**

11. In order to provide CARTA with the best solution based on the answers to the clarification questions, we would like to ask for an extension on the Proposal Delivery schedule by 4 weeks.
    a. **No, the due date will remain on February 17, 2017**

12. Are there any tokens that are currently being handled at CARTA that the Farebox needs to handle? Please note that depending on the restrictions of the coin validator, there is the possibility that existing tokens might not be able to be validated on the Farebox
    a. **No, we do not use tokens.**

13. In the RFP CARTA states the Fare Collection System interface with:
    • Electronic Destination Signs
    • Computer-aided dispatch/automatic vehicle locator (CAD/AVL) system

    Could you clarify exactly what is required of the interface?
    (ex. CAD/AVL interface: Single Point Login, and Location Data Retrieval functions)

    In order to properly price this interface based on the scope of work, could you also provide us with the point of contacts for the existing Electronic Destination Sign and CAD/AVL Vendors who were involved in the installation of the equipment at CARTA?

a. **Hanover. Transdev (Operator) owns our AVL system.**

14. Will the IT infrastructure for the Data Collection and Recovery System be completely covered by CARTA including onboard router, access points at the Garage, and server equipment?
    a. **Yes.**

15. Page 45, Section X Data Collection and Reporting System
    The RFP does not provide specification requirements for the vault receivers/audit units nor the quantity required in the pricing sheet.
    a. **Please see attached pricing list.**
    Could you provide the quantities required? Or do we need to utilize existing Vault equipment if any? If we need to retrofit, what vendor/product specifications do we need to meet?
    b. **Yes, we will use existing vault equipment**
    Also, are the vault receivers requested outdoor Vault Receivers or indoor Through-the-Wall Vault Receivers? The price may change depending on the answer to this question.
    c. **They are outdoor receivers.**
    In the case that it is through-the-wall, is it the Contractor's scope of work for breaking down the wall to fit the Vault?
    d. **They are outdoor receivers.**

16. The RFP requirement states that the Data Probe be the means to transfer data between the DCRS and Fareboxes. We believe that Wi-Fi or other wireless solutions are more efficient when handling not only cash, but smart card, mobile ticketing systems. Can the Contractor propose this as an alternative? Similar to the question stated above, if this solution were to be proposed will the IT infrastructure and networking be available by CARTA?
    a. **Yes to both questions.**

17. Although the RFP Requirements request for Mobile Ticketing, Smart Card, and Magnetic Solutions, the Pricing List does not list these solutions out. Are they mandatory systems? If so, could you revise the price sheet to reflect this?
    a. **Yes, they are mandatory.**

18. The RFP references a "Computer-Aided Dispatch/Automatic Vehicle Locator" (CAD/AVL) system, however it does not indicated who the supplier is of the system. Plus does CARTA want the "Farebox Management System" integrated with the CAD/AVL system?
    a. **Please see Q 13.**

19. How many POS terminals/devices does CARTA see they will need other than the ones mentioned for the main office and possibly at the transfer center location(s) in the future?
    a. **Not sure yet.**

20. Does CARTA plan on providing these POS devices to any retail partners in the future?
    a. **Possibly.**

21. CARTA describes the need to install FSTVM's in Phase 2 of the fare management system, so how many FSTVM's does CARTA wanted to install and over what period of time?
    a. **Will depend on cost.**

22. Can CARTA provide more detail on what the mean by Full Service Ticket Vending Machines, i.e., does CARTA want these FSTVM's to have the capability of reloading a smartcard? So whatever additional specifications CARTA could share on this would be helpful.
    a. **Yes, we would like them to be full service including reloading smartcards.**

23. In the Mobile Ticketing Functional and Performance Requirements section of the RFP, CARTA indicates that one of the features they want the application to support is "Distance-Based Fares". How soon does CARTA see putting this fare structure into place at the agency?
    a. **No current plans**

24. Magnetic Card Processing Unit: Besides all the functionality and features CARTA is requesting with respect to the MCPU device, it is recommended that this device be upgraded so that it is capable of supporting the move away from using magnetic card media which is occurring in the industry and be in the position to support the use of smartcards by being able to validate/issue/encode/print/write with upgrading the device so that will accept the smartcard media and limited use smartcards without additional expense to CARTA. So would CARTA consider this request of upgrading the MCPU from Magnetic Card, to also include the capability of support the Smartcard environment?
    a. **Yes.**

25. Magnetic Cards – Swipe Reader: Instead of using the Magnetic Swipe Reader, our company uses the MCPU device to process all magnetic card transactions due to the fact that the industry is moving away from the Swipe Reader. As has been mentioned above in the MCPU clarification point, it has been our experience that agencies can manage the magnetic card environment without the need for a Swipe Reader device and replaces it with a magnetic reader that will support all the operation requirements that CARTA would be looking for. These other agencies have found that these devices are much more effective in supporting the magnetic card environment. So will CARTA find this an acceptable substitute for the "Magnetic Card – Swipe Reader" that will support the processing of all magnetic card transactions on the MCUP device?
    a. **Yes**

26. Bill Transport: In the "Bill Transport" section of the RFP, the following is stated: "The bill validator shall feed an accepted bill into a bill transport, which shall progress the bill into the cashbox. The bill transport shall employ a pulley and belt mechanism to positively engage an unfolded bill, irrespective of condition. No force shall be required to cause the bill transport to start. Solid-state devices shall be employed to start the bill transport. The transport shall operate until the bill has been deposited into the cashbox."

    Will CARTA consider other types of technology other than what is stated above that will comply with the requirement of transporting bills to the cashbox?
    a. **Yes.**

27. Passenger Display - Two Buttons: In this section, the RFP states: "The passenger display shall be equipped with two buttons, one on either side of the display. The buttons shall be of the sealed membrane type with tactile feedback. Different "labels" for the buttons shall be shown on the passenger display depending on the task to be performed"

    Due to technology changing so quickly and new machinery features being introduced into the market place companies are installing touch-screen displays on their fareboxes. With this touch-screen display and the technology behind i.e., image-type display instead of line alphanumeric

characters, it will be more dynamic from an interaction perspective and the passenger will have a much easier time understanding the instructions/prompts which will enhance the passenger experiences with the new fare management system. Correspondingly, there will be no restrictions on adding functionality to the farebox display, if the agency so desires that at a later dates. Will CARTA find this an acceptable substitute for the passenger display feature on the fareboxes?

    a. **Yes.**

28. OCU Driver Pushbuttons: In this section of the RFP, the following is stated: "The OCU keypad shall include at minimum the digits 0 through 9, the letters A through D, star (*), pound sign (#), four arrow keys, ENTER, and eight unmarked function keys. The keys shall be provided in a durable silicon rubber actuator. Where the keys are marked, they shall be hot molded with the markings with filled characters. Surface printing shall not be acceptable. Keys shall be rated for a minimum of 500,000 keypresses, or, if touch-screen technology is proposed, a minimum of 500,000 activations per specific touch point on the screen."

"The function keys shall be mounted on either side of the OCU display. Different "labels" for the function keys shall be shown on the driver's display depending on the task to be performed. All driver pushbuttons shall provide tactile and audio feedback and be sealed against the intrusion of liquids and other foreign material."

The OCU uses a touch-screen display, which is much more flexible and does not limit the agency from adding functionality to the OCU at a later date when it is required. The OCU touch-screen display can allocate as many keys as the system requires, together with supporting 19 tactile keys. The tactile keys material can be silicon rubber actuator or a similar material. The keys will be marked as needed, and those implemented through the touch-screen display can be labeled dynamically and as need through the system. The different designs of the screen, labels, and messages can be demonstrated at the appropriate time during the Detail Design Specifications review process. So will CARTA find this an acceptable substitute for the functionality required for the OCU via the touch-screen display?

    a. **Yes.**

29. Locks and Keys: In the RFP, it states the following about the Locks & Keys for the cashbox: "The lock and key used for the cashbox shall be of the rare earth magnetic type, MIWA or approved equal. This key shall not resemble a common house key in overall appearance and shall not be removable from the farebox without incurring damage.

Can we propose an alternative key device that will be used to open the cash box when it is inserted into the Farebox and/or vault and is made of stainless steel. This lock environment is a high security designed in a round fashion, utilizing 8 pins, arranged in a circle and the pins must match eight small holes in the lock attached to the cashbox. The design is a patented one and is manufactured by only one company in the world and any copies must be manufactured by them. The key is mounted in the Farebox or vault in a way that once it's mounted, the only way to remove it is by breaking the key itself. Is this proposed alternative acceptable to CARTA?

    a. **Yes.**

30. Mobile Ticketing Application: In this section, the RFP states the following on the mobile app: "The mobile ticketing application and other supporting software provided shall allow customers with smart phones and tablets, including those at minimum running Apple IOS®, Google Andriod®, and Windows Mobile® operating system.

In working with other transit agencies across North America, only Apple IOS®, Google Andriod® are the operating systems that they have requested to be supported with their "Mobile Ticketing Application" and have avoided Windows Mobile® at this juncture. Would it be acceptable to CARTA to not support the Windows Mobile® environment at this stage of their "Mobile Ticketing Application"?

    a. Yes.

31. Credit Card Processing: It states in this section of the RFP, the following on Credit Card Processing: As an option, it shall be possible to process credit cards using the swipe card reader and the optional smart card reader if purchased under this contract. The smart card reader shall be certified to process major smart card-based credit cards available at the time the option is exercised. Credit cards processed using the swipe reader or the smart card reader shall be read and the credit card information stored for subsequent uploading to the data system. Real- time authorization of credit cards is not required. It shall be possible to validate credit cards against a bad number list; cards whose numbers appear on this list shall be rejected.

We are recommending that this optional requirement be removed, since is not clear if this operational requirement will need to support the use of credit/debit cards that have one of these three methods of conducting a payment transaction available today in the market place, such as a magnetic strip card, chip card or Near Field Communications (NFC) method of payment i.e., Apple Pay® or Android Pay®. So will CARTA concur with this recommendation at this time?

    a. No, we would like this option to remain.

OFFEROR SHALL ACKNOWLEDGE RECEIPT OF ADDENDUM NO. 1 IN THE SPACE PROVIDED BELOW AND RETURN WITH SUBMITTAL. FAILURE TO DO SO MAY SUBJECT PROPOSAL TO REJECTION.

_____   _____
Authorized Signature   Firm

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Date