



REQUEST FOR PROPOSALS

TULSA BIKE SHARE SYSTEM

APPENDICES

RELEASE DATE: August 19th, 2016

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APPENDIX

APPENDIX A: SYSTEM REQUIREMENTS

The following includes both required and preferred elements of the System. Successful responses will meet all of the required criteria. Innovation in responses is welcomed in to the preferred elements.

These elements are technology neutral. Although there is a preference for a hub/dock based System, the following do not prescribe the use smart bikes or electronic assist bikes.

A. SYSTEM DEVELOPMENT, PROCUREMENT, INSTALLATION & LAUNCH

1. Station and bike shipping, assembly and installation

The following are **required** elements:

Procure (manufacture and/or purchase) and set-up entire *hardware and software* for front and back of house ongoing operations:

- Bicycles
- Stations
- Spare parts
- Software and licensing
- Supplies/Equipment for offices, management and distribution

2. Vehicles and Operations space

The following are **required** elements:

- The Contractor will be responsible for identifying and acquiring the office and warehouse space needed for launch and ongoing operations; and
- The Contractor will be responsible for acquiring all vehicles necessary to manage the bike share fleet, provide customer service, maintenance and all other operational needs.

The following are **most desired** elements:

- All vehicles used by the operator should be clearly marked with labels identifying as a part of the bike share fleet.; and
- Clean fuel vehicles are preferred for vehicles used for rebalancing bicycles

3. Hiring and training of staff

The following are **required** elements:

- A dedicated Project Manager with prior experience working in bike share operations for multiple years in multiple locations must be assigned to the project;
- An Operations Manager with prior experience working on bike share programs;

- A structure for operations including hiring and training bike mechanic(s), station mechanic(s) and technician(s) necessary to adequately operate and maintain the system;
- Staff who are present to provide prelaunch membership marketing, management and customer service; and
- All staff must have adequate prior experience in their respective roles and a proven track record for excellence.
- All local staff members of the operator must be adequately trained to address safety, emergency, maintenance and customer support issues before the service is launched, preferably with the ability to respond without loss of service as the system expands.

B. SYSTEM MAINTENANCE AND OPERATION

1. Reporting

The Contractor will be required to provide quarterly reports on specific metrics that will be collected by the system's software and by periodic surveys of customers. In addition to the reports, raw quantitative data must be made available in a usable format. The metrics should include, but are not limited to, the following:

1.1. Tracked by System:

- Bike usage
- By members (day/quarter/annual)
- By walk-up renters (day/quarter/annual)
- Bicycle miles traveled (day/quarter/annual)
- Trips and their duration
- Financial summaries
- Average repair times
- Station specific data with regard to use and users, functionality and efficiency

1.2 Tracked by Customer Service:

- Crash data
- Theft/vandalism
- Comments and complaints

1.3. Tracked by an annual survey of Customers:

- Number of annual subscribers
- Number of annual
- Trip purpose
- Customer satisfaction ratings
- Success at reaching target market

2. Customer Service

The following are **required** elements:

- A system to immediately aid users with mechanical issues and/or injuries;

- Customer service available 24/7 preferable, otherwise at all hours that the rental system is available; and
- Customer service phone number on every bike with durable, weather resistant labels.

The following are **most desired** elements:

- Ability to send out electronic messages to all subscribers (who do not opt out of such communication) to relay safety, service and event notifications;

See Appendix B for required customer service performance levels that must be maintained.

3. Maintenance and Repair

The following are **required** elements:

- Regular inspection, cleaning and maintenance at the frequency recommended by the equipment manufacturer, and preferably no less than once every two weeks per station and bicycle;
- Operator assumes responsibility for street sweeping and clean-up at all on and off street locations in accordance with the current schedule of municipalities, institutions, or private landowners;
- Expeditious replacement and /or repair of all items needing such services; and

The following are **most desired** elements:

- Replacement and/or repair of all items needing such services within twenty four hours;
- Provision of spare bikes to be put into the system to replace bikes taken out for maintenance or repair, or that are missing or stolen; and

See Appendix B for required maintenance and repair performance levels that must be maintained.

4. Rebalancing

The following are **required** elements:

- Ability to provide and execute a plan that states a clear understanding of rebalancing issues and ensuring a balanced system;
- Ability to expand/contract stations to accommodate large crowds at major events.

The following are **most desired** elements:

- Dynamic pricing structure and/or other mechanisms to encourage natural, system-wide balancing, thereby minimizing vehicle needs and costs for rebalancing.

See Appendix B for rebalancing performance levels that must be maintained.

5. Website Design

The following are **required** elements:

- Ongoing management of website and related technical issues;
- Data security, especially for financial data, user names, and addresses that is Payment Card Industry (PCI) compliant.
- A mechanism for users to report problems and make suggestions for system improvement;
- Real-time communication with stations to track bicycle and hub status;
- Access to all registration and travel data with the ability to relay data for use in custom reports based on any station or combination of stations; and
- Ability to collect survey information and customer satisfaction ratings.
- Map of station locations with address, directions, and transit information;
- Contractor shall use the General Bike Share Feed Specification (GBFS), a standardized data feed for bike share system availability.
- Provide iOS and Android App with real-time map updates to allow users to locate stations and status of bicycles.

The following are **most desired** elements:

- Capacity to convey bicycle safety information, laws and/or warnings affecting bicyclists (Ex: Brief safety and “rules of the road” video and interactive test that is required to watch before subscribing);
- Ability for website to accept and/or allow user to change annual subscriptions;
- Capacity for user to track number of available bikes and open docking points in each terminal via web page and/or mobile device;
- Interactive map showing status of bicycles at stations;
- Spanish language options on all website; and
- Phone contact information prominent on website.

See Appendix B for website performance levels that must be maintained.

6. Safety

The following are **required** elements:

- Availability of safety information on the website, terminals and subscription agreement with regard to the importance of helmets;
- Stations must have the capacity to convey safety information and laws affecting bicyclist; and
- Terminals should have clear and prominent instructions directing the user explaining who to call in the event of a problem or emergency.

The following are **most desired** elements:

- Safety stickers or tips at all stations;
- 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);
- Produce an informational safety video for subscribers to watch;
- Work with a local organization to provide low-cost or subsidized helmets to all or selected user groups and encourage the use of a helmet when riding; and
- Partner with local bicycle shops to offer discounted helmets to all subscribers of the program.

7. Marketing, Branding and Communication

Tulsa Bike Share will be a partner in marketing Tulsa Bike Share, but it will be the responsibility of the operator to develop and execute marketing and communications efforts around Tulsa's bike share program. Tulsa Bike Share is interested in building upon successful marketing and media campaigns from other cities.

The following are **required** elements:

- Develop a marketing strategy for operating the system, including personnel, materials used, projected costs, etc.
- Provide the ability to display one names and/or logo of a sponsor on System elements, including bicycles, stations, and the website
- Prior and successful experience marketing new bike share programs.
- Produce membership cards that can be customized with bike share logo and sponsor recognition;
- A well-designed marketing plan and communications strategy that generates enthusiasm prior to system launch and has ongoing elements;
- A satisfactory public relations emergency response to address a fatality or serious injury; and
- A quarterly report analyzing system operations including age statistics, origin and destination data, and new subscribers.
- Track record boosting total number of rides, membership and revenues generated by users through successful marketing

The following are **desired** elements:

- Provide the ability to display more than one name and/or logo of a sponsor on on each System element, including bicycles, stations, and the website
- Capability to generate significant free and/or paid publicity on local and national television, radio, print, internet and other outlets; and
- Strategy for reaching out to major employers, institutions or neighborhood groups to offer bulk discounted memberships.

C. BUSINESS & FINANCIAL OPERATIONS

1. Risk Management

The following are **required** elements:

- Ability to assume all liability for the system. Indemnify and hold harmless Tulsa Bike Share, the City of Tulsa and INCOG (Parties) for all third party claims against the these Parties related to the use of the Tulsa Bike Sharing System;

- All users sign a legally binding waiver/ assumption of risk, either when subscribing via the website or as part of the on-site registration process;

The following are **most desired** elements:

- General Liability insurance consistent with requirements of the agency, institution, and/or private landowner and through a credible company or organization (\$1 million per occurrence and a minimum of \$2 million (may request up to \$5 million) aggregate);
- Ability to list all participating institutions, and/or private landowners as co-insured's on liability insurance;
- Assurance of financial sustainability through term of contract;
- Umbrella liability policy of at least \$1 million;
- Carry valid workers compensation insurance as prescribed by Oklahoma law covering all employees who are to provide work for the System and Employers; and,
- Business automobile liability insurance or equivalent with a limit of not less than one million dollars (\$1,000,000) each accident. Such insurance shall include coverage for owned, hired, and non-owned vehicles.
- Specific insurance coverage ensuring protection against bodily injury and information risk exposures presented by this program.

D. CAPITAL NEEDS

In addition to the required elements listed in the Scope of Work, the following include desired System elements:

1. Bicycles

The following are **required** elements:

- Aluminum frame;
- One size frame designed to fit the majority of the adult population with seat only adjustment;
- Adjustable seat that cannot be removed;
- One-piece handlebar that covers and protects all components and cables;
- Low center of gravity for stability;
- 3-speed internal gearing;
- Enclosed drivetrain and full fenders for protection from grease, dirt and tire spray;
- Covered, low-maintenance, durable rust-resistant derailleur;
- Reliable front/rear internal brakes;
- A bell;
- Active lighting and reflectors (front and rear);
- Luggage carrier with the ability to support up to twenty pounds;
- Heavy duty tires with a puncture-resistant casing and a security reflector band on each side;
- Heavy duty rims made for rugged urban cycling;
- Estimate of the useful life of each bicycle and proposed warranty term;

- An RFID tag (also works as anti-theft mechanism & unique identification of each bike); and
- Ability to customize bikes with name and sponsor logos on each bicycle's rear fender, chain guard, handlebars and/or front placard as designated by the potential sponsor(s).

2. Stations

The following are **required** elements:

a. Overall Station

- Stand alone stations so that preparatory work/excavation/trenching is not needed and stations can be relocated easily;
- Capacity to convey safety information and laws affecting bicyclists;
- Capacity to maintain security of the system during a power failure event or loss of internet connection;
- If wireless internet connections are used, a system that is highly reliable and secure with encryption for financial data.
- Real-time communication between stations and headquarters, particularly to report number of bikes per station and facilitate re-distribution;
- No vertical or sharp objects in the roadway or on the sidewalk that would impede pedestrian travel or restrict the ability to park cars for existing or removed stations;
- Layout that minimally impedes pedestrian traffic and ideally has no horizontal components that could trip a pedestrian or injure a rider approaching a terminal at night;
- Unified look and feel of all stations/hubs within the network;
- Estimate of the useful life of each station (terminal, hub and sign) and proposed warranty term;
- Lighting and signage should adhere to existing ordinances or have exceptions written into those ordinances; and
- A prominent space for customized bike share logo display as well as sponsor logo display for stations on private Right of Way or in public Right of Way
- Stations requiring power must be capable of running 24/7 on off-grid energy sources such as solar, battery, etc. where site conditions allow.

b. Terminals

- User-friendly interface;
- Capable of transmitting data securely, especially financial data, user names, and addresses, that is Payment Card Industry (PCI) compliant and satisfies the recommendations of the City of Charlotte's E-Business Receipts and Payments Policy.
- All terminals in the system accept walk-up customers with the agreement to a liability waiver;
- Accepts credit/debit cards and membership cards;
- Capacity for user to identify a bicycle as needing repair;
- A clear process for situations in which a user cannot return a bike because of a full

terminal or when a user cannot rent a bike due to an empty terminal; and

- Clear and prominent instructions directing the user explaining who to call in the event of a problem or emergency.

c. Hub Specifications

- Docking points that are intuitive and easy to use;
- Vandal and theft-proof connection between hub and bike; and
- Useful life of five years or greater.

d. Sign Specifications

- Signs can be customized with bike share logo and sponsor recognition;
- Consistent signage alerting people to the presence of the bike station; and
- Adequate space at each station for a map frame indicating both station locations and bicycle routes/infrastructure;

The following are **most desired** elements:

- Capacity for station and major components (bicycle, hub, terminal) to self-report mechanical problems;
- Smallest feasible footprint;
- Aesthetic compatibility with streetscape and neighborhood context, both when terminal is full of bicycles and when it is empty;
- 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);
- Capacity to install stations on public or private property, in a covered area, or outside;
- Easily movable stations that require minimal time/cost to install and/or remove;
- Can operate “grid-free” (i.e. doesn’t need to connect to electrical grid), potentially by way of solar power or other types of alternative energy sources, as feasible;
- Use of reliable alternative energy sources;
- If using reliable alternative energy sources, employment of a backup power source;
- Ability to modify or design the system components (bikes, terminal, hub, and/or sign) to address issues (e.g. climate, vandalism);
- Capacity to add lighting, where necessary, to facilitate nighttime use of terminal, adjustment of bicycles, reduce vandalism, etcetera; and
- If wireless internet connections are used, a system that is highly reliable and secure with encryption for financial data.
- Prints customer receipts that can be customized with bike share logo and sponsor recognition;
- Automatic confirmation that a subscriber’s credit card is valid and has sufficient funds to cover charges if bicycle is not returned, preferably before each bicycle is removed;
- Touch screen;
- Spanish translation available; and
- Ability to sign up new subscribers at all terminals.

APPENDIX B: PERFORMANCE METRICS

Respondent must provide a coherent, well thought out plan that ensures the following required elements of the System are maintained. Most desired elements are listed as well.

1. Customer Service

The following are **required** elements:

- 95% of calls to the Call Center are answered within 30 seconds and no more than 5% of calls are dropped;
- 95% of emails are answered within 24 hours;
- Customer service available during all hours that rental system is operating.

The following are **most desired** elements:

- 95% of membership packages are mailed within 24 hours;
- Adequate staffing to ensure maximum wait time on phone of one minute;
- Customer service available 24/7.

2. Maintenance and Repair

The following are **required** elements:

- Bicycle station is cleaned a minimum of every 2 weeks or as needed, depending on weather conditions
- Bicycle has a routine maintenance inspection at least once per month;
- Graffiti/Vandalism is removed/rectified within 48 hours of notification to the operator;

The following are **most desired** elements:

- Snow is removed from the sidewalks by stations within 24 hours of a snowfall;
- Snow is removed from stations within 24 hours of street snow plowing by stations;
- Refurbishment of the system's bicycles (e.g., paint, logo, sticker removal) on an annual basis, so that they appear new and attractive.

3. Rebalancing

The following are **required** elements:

- Stations are neither full nor empty for a period longer than three hours; No more than an average of 10 instances of a station full for longer than 15 minutes per month per station

and no more than 30 instances of a station full for longer than 15 minutes at any station in a month.

- A minimum of 90% of bicycles are deployed at all times, unless otherwise directed by Tulsa Bike Share.

Website: Development of a web-based dashboard and data portal that reports (at a minimum) the following:

The following are **most desired** elements:

- Station Availability – Daily – Instances of full/empty stations by 15 minute increments;
- Station Deployment – Daily – number of stations deployed;
- Bicycle Availability – Daily – number of bicycles deployed for revenue service;
- Bicycle Maintenance – Weekly – number of bicycles serviced;
- Station Cleaning – Weekly - number of stations serviced;
- Graffiti/Vandalism – Weekly – number of incidences of graffiti/vandalism reported and number addressed;
- Customer Service Call Data – number of calls and average call duration per day;
- Calls Dropped – Daily – number and percentage of calls dropped;
- Call Center Responsiveness – Daily – percentage of calls answered in less than 30 seconds;
- Emails – Daily – number of emails received and percentage responded to in 24 hours;
- Ridership by Member Type – Daily – Report the number of rentals and trips by day;
- Trip Duration – Daily – Trip duration by user class in 30 minute increments;
- Miles Traveled – Monthly – Total miles traveled by user class;
- Station Performance – Weekly – Rentals and returns by station;
- Annual Members – Monthly – Weekly – Three Day – New and cumulative members;
- Casual Users – Daily – New and cumulative members.