



WASHINGTON
METROPOLITAN
AREA TRANSIT
AUTHORITY
(WMATA)

REQUEST FOR INFORMATION (RFI)

BUS OPERATOR CANDIDATE ASSESSMENT TOOL

DUE DATE: MARCH 7, 2018 AT 2:00 P.M. EST



Washington Metropolitan Area Transit Authority (WMATA)

DISCLAIMER: This is not a solicitation. This is not a Request for Quote (RFQ), Invitation for Bid (IFB), Request for Proposal (RFP), or an announcement of a solicitation and does not assume Washington Metropolitan Area Transit Authority (WMATA) will award a contract or proceed with any of the above solicitations in the near future. The information requested herein is for information purposes and does not constitute a commitment, implied or otherwise, that a procurement action will be issued or awarded.

SYNOPSIS: REQUEST FOR INFORMATION (RFI)

Vendor's response to this RFI **is not** an offer. This Request for Information does not commit WMATA to any incurred costs in preparation of any submissions to this notice, or to contract for services and it is issued for WMATA Market Research purposes only. No cost(s) associated with your response shall be charged to WMATA for any reason. This document shall not be construed as a request or authorization to perform work at WMATA's expense. Any work performed by a vendor will be at the vendor's own discretion and expense. This RFI does not represent a commitment to purchase nor does it obligate WMATA in any manner. Submission of a response constitutes an acknowledgement that the vendor has read and agrees to be bound by such terms. WMATA may submit a formal Request for Proposal (RFP) for the services described in this document. There is no guarantee that WMATA will publish an RFP. If published, the RFP will be sent to vendors that demonstrate adequate capabilities in response to this RFI. The information contained in this RFI is provided based upon the information gathered and/or known at this time. There are no guarantees as to the accuracy of this information.

Participation in this RFI is voluntary and WMATA will not pay for the preparation of any information submitted by a respondent or for WMATA's use of that information.



Washington Metropolitan Area Transit Authority (WMATA)

INTRODUCTION:

In order to effectively and efficiently pre-screen an applicant pool of roughly 300 to 1250 individuals per month (up to 15,000 per year), Washington Metropolitan Area Transit Authority (WMATA) is seeking to identify a robust and comprehensive assessment tool to ensure that we identify ideal candidates to satisfactorily perform in the role of Bus Operator, including those with the leadership potential.

WMATA intends to purchase and implement a **Commercial off-the-shelf Bus Operator assessment tool**. The specific schedule, deliverables and roles and responsibilities between WMATA and the vendor during implementation are yet to be determined. Vendors are encouraged to provide a “best practice” solution for the implementation of the assessment tool.

The assessment tool will be used by the Human Resources and Bus Transportation departments to test candidates for basic knowledge, skills, and abilities that are required to satisfactorily perform the role of Bus Operator. Additionally, the assessment tool should have the ability to assess the candidates’ writing skills, comprehension skills, customer service skills and ability to follow directions.

WMATA requests information regarding vendor capabilities in several aspects for a public transit Bus Operator candidate assessment tool, for WMATA. WMATA seeks solutions and budgetary estimates for its Bus Operator candidate assessment and human resource needs. WMATA’s primary objective in pursuing this outsourcing is to capitalize on the vendor’s knowledge and experience in implementing and supporting an assessment tool to help WMATA identify ideal candidates who possess the desired skills and competencies to become a public transit Bus Operator.

This RFI is issued as a means to conduct market research and information gathering on a Bus Operator Candidate Assessment Tool for the Washington Metropolitan Area Transit Authority (WMATA) and to solicit information that will enable WMATA to determine industry participation in response to the release of a possible future solicitation and as a means of technical discovery and information gathering. This RFI is for planning purposes only and should not be construed as a solicitation nor should it be construed as an obligation on the part of the WMATA to make any purchases. WMATA may utilize the results of this RFI in drafting a competitive solicitation (RFP) for the subject services/products/equipment. Any future contract that may be awarded must comply with WMATA’s procurement requirements.

Based on the information provided by the respondents to this RFI, a determination will be made regarding any actual contracting through a procurement process at WMATA’s discretion.



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AGENCY OVERVIEW

The Washington Metropolitan Area Transit Authority (WMATA or Metro) is the transit provider for the National Capital Region, providing safe, clean and reliable service to both residents and visitors. Our customers include more than a third of the federal government workforce and millions of tourists who visit the Nation's Capital every year. Metro operates the second largest heavy rail transit system, sixth largest bus network and fifth largest para-transit service in the United States.

PROJECT OVERVIEW

WMATA, currently, does not have an internet / web based assessment tool and is relying heavily on the skills of interviewers to determine whether the candidate possesses the core competencies needed to perform the job of Bus Operator.

The optimal tool must be able to assess basic knowledge, skills, abilities, applicant behaviors and the likelihood to adopt safe work habits. The assessment tool should have the technical capabilities to be administered to both large and small groups via web/computer-based application, at the same time, all while maintaining the validity, reliability, test integrity, security and positive user-friendly experience. The assessment must be immediately electronically scored and supported by the vendor. An assessment report will be provided for each completed assessment with the ability to convert to Excel or .CSV format in order to be used for analytical and statistical purposes.



SCOPE OF WORK

1 Scope of Work

The following sections describe the functional and technical considerations that WMATA seeks in a new Bus Operator Assessment Tool. They are presented as high-level business needs and as questions or statements for soliciting information.

1.1 Functionality

1	The tool must be a networked or web-based product that is accessible via the internet.
2	The tool shall support an unlimited amount of applicants.
3	The tool shall be used for assessing a candidate's skills and core competencies as they relate to becoming an effective Bus Operator.
4	The tool shall provide scoring reports for each assessment completed.
5	Are the scores immediately calculated and displayed on the screen immediately after the assessment is completed for the applicant to view?
6	The Vendor must provide troubleshooting and service for the tool.
7	Training must be provided on how to best use and administer the tool.
8	The tool shall provide instructions and FAQs for both the end-users and administrators.
9	What other languages can the system support? What components are required to implement multiple languages?
10	The system shall be scalable to accommodate increased applicant volume. What scalability factors should WMATA consider for evaluating the assessment tool?
11	Is your software proprietary or an open system? And if it is proprietary, what is the process for requesting enhancements or the ability to customize a requirement? How does this impact future upgrades and what are the skill-sets required by in-house staff if the customizations are done onsite?



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12	Describe the tools and methods of updating the assessment to reflect changes in the industry or standard guidelines and practices.
13	Explain which functions are editable or configurable, explain how the adjustments to the menu functions are made. Does the system provide acknowledgement, confirmations or warnings, when adjustments to menu functions are made?
14	What are the newest features and benefits available in your latest offering?
15	Provide visual examples of your assessment tool as well as a list of the types of questions asked.
16	Explain how your assessment tool meets Section 508 compliance.
17	Provide for WMATA's review and approval a system architectural design document to support WMATA's assessment tool requirements.
18	Provide budgetary pricing for the proposed solution.



1.2 Test Validation

1	What validation method does your assessment tool use for assessing each applicant's job-relatedness?
2	<p>Please explain how your assessment tool:</p> <ul style="list-style-type: none">• Measures the most observable, concrete, and significant knowledge, skills, and abilities (KSAs) of a Bus Operator. (Reference: Attachment POSITION DESCRIPTION)• Identifies the necessary KSA's and important work behaviors required for successful job performance and determines the importance of those work behaviors.
3	Please explain how your assessment tool employed reasonable competence in constructing the test. Does your assessment tool use an expert third-party vendor to construct the test?
4	Please explain how your assessment tool demonstrated a direct relationship between the job analysis and KSAs.
5	<p>Does your assessment tool:</p> <ul style="list-style-type: none">• Get to the core of important knowledge areas of the applicant?• Focus on the most concrete KSAs identified?• Avoid asking trivial distinctions about particular kinds of forms, facts, policies or procedures?• Avoid focusing on memorizing unimportant information, especially when an employee can use reference materials to find the answer (e.g., test questions do not require an applicant to memorize definitions or rules)?• Measure the applicant's ability to understand the underlying principles associated with the policy, procedure, definition or rule?
6	<p>Explain how your assessment tool:</p> <ul style="list-style-type: none">• Measures an applicant's ability in nearly all of the important aspects of the job.• Proportionally weights and tests the important aspects of the job based on how integral they are to successful job performance.



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7	<p>Does your assessment tool test procedures and methodology similar to the procedures required by the job itself, such as:</p> <ul style="list-style-type: none">• Offer simple, easy to understand test instructions?• Avoid placing candidates under excessive time constraints to complete the test (unless such constraints are an identifiable aspect of the job)?• Assesses the reading level of the applicant? What reading level(s) is (are) assessed?• Carefully scrutinizes any written exam components?
8	<p>Explain how your assessment tool scores completed assessments. Does it:</p> <ul style="list-style-type: none">• Avoid rank-order scoring unless test validity establishes that one or two-point differences in scores reflect differences in job performance?• Use cutoff scores that are reasonable and consistent with normal expectations of acceptable proficiency within the transit workforce?



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System Administration

1	What administration functions are available 24 hours per day, excluding certain maintenance hours?
2	The assessment tool shall be accessible for administration functions via a networked PC. What other networked devices can be used for performing administrative functions on the system?
3	The assessment tool shall provide both ongoing regular displays of system activity, and specialized tracing. What tools and features are available for monitoring, such as system diagnostics, detailed trace file generation and other tools useful in monitoring system operation?
4	Explain the approach and procedures for backup and disaster recovery.
5	Provide the technical skillsets that are required for administering the assessment tool.
6	Submit sample screen shots and a high level diagram of major menu options and tools provided for administering the assessment tool.
7	Describe the administrative environment at a high level, e.g. web-based, client server, etc., including any remote access capabilities.
8	Describe in detail the utilities available for system administration functionality.
9	Describe how administrative access is controlled.
10	What export capabilities does the system provide?
11	Does the system provide any proactive monitoring tools to anticipate and communicate system failures? Please provide details regarding this.
12	Describe the procedure for installing new software releases into a production environment.
13	Describe the ongoing maintenance process and responsibilities.
14	Will routine maintenance require the assessment tool to be out of service? If so, please describe.



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15	Explain how the maintenance agreement and warranty periods are administered.
16	With which local or national testing centers do you have an affiliation?
17	Provide a soft copy of the product overview and system administration documentation of all proposed system software and hardware.
18	Provide budgetary pricing for user and system administration training.



1.3 Reporting

1	The assessment tool shall provide the capability for administrators to generate statistical data for reporting to management for the purpose of assessing and evaluating the skills of Bus Operator candidates with ability to display data in formats such as graphs, charts, and Excel or .CSV format.
2	The assessment tool shall provide the capability to track and report statistical data for repeat testers.
3	Describe the functionality of different types of reporting available from the assessment tool with a particular focus on dashboards, standard reports, and the ability to create ad hoc customized reports.
4	What process exists to add additional reports?
5	Are there limits to the quantity of reports that can be run?
6	What type of reports can be run to provide both the administrator and the Bus Operator candidate a copy of the assessment results?



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1.4 Security

1	What type of security measures are available in order to manage access to the interface and the assessment results?
2	What security features are available to protect the candidate's information?
3	Provide information on how WMATA's privacy is ensured for hosted solutions from the workstation to the server and the database? Is the database encrypted, if so please describe the encryption method? Please describe how the privacy of WMATA's data is maintained in flight from the user workstation to/from your application infrastructure and between the application infrastructure components.
4	Describe how administrative access is controlled.
5	Describe how database passwords are set up, maintained and changed.



1.5 Implementation

1	Explain the project methodology used to implement multiple assessments at once.
2	Provide an overview of your assessment's standard implementation methodology.
3	What is the standard implementation timeframe?
4	Provide definitions for levels of post implementation support and the general cost for each level.
5	Will the vendor demo or pilot the assessment tool to determine its fitness for WMATA? If so, what resources are needed from WMATA in order to do this?
6	Will the vendor provide system design and integration with complete system design documentation? Provide details about the documentation that will be provided.
7	Describe the beta testing process, including the pilot demonstration process?
8	What type of training options are available for the implemented solution?
9	Provide a list of the total number of customers using your assessment tool. Identify the three largest transit agencies using your assessment tool.
10	What type of support is available after system has been implemented?
11	Provide for WMATA's review and approval a detailed system test and acceptance plan.



1.6 Financial

1	If your solution is hosted, provide a general cost of yearly subscription or licensing not including any enhanced support. For a solution that is not hosted please provide general annual maintenance costs and licenses cost/structure (per user or site). What are the pros/cons and associated costs for hosted vs on-premise solution?
2	What would be the cost breakdown of initial implementation for an organization that hosts approximately 1,250 assessments to be completed monthly/15,000 to be completed annually? What would be the cost breakdown for subsequent years?
3	How is the annual licensing fee structured? Per assessment, per month, per year?
4	Provide warranty information. What is the warranty period?
5	What is the "extended warranty" (i.e. Maintenance) to cover past initial 1-2 years coverage?



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1.7 Additional Information

Include any information that will be helpful to WMATA in the successful installation and implementation of a bus operator assessment tool, such as best practices, optimal or suggested features, changes and/or enhancements and related information.

- **Vendor shall provide a project manager single point of contact. (WMATA shall provide a single point of contact for the project as well.)**



APPENDIX A: Template for Company Information

Please use the template to provide information about your company:

1	Company Name	
2	Company Address	
3	Company Website	
4	Main Products and Services	
5	Description of products and services that are already delivered to your public transit customers today, and could be comparable to what is requested in this RFI	
6	Company Point of Contact (POC) for this RFI (Name, Email, Phone)	
7	Number of Customers	
8	Geographical Distribution of Customers	
9	Potential for Conflict of Interest in Customer Base	
References		
Reference 1 (Current Transit Customer)	POC (Name, Email, Phone)	
	Company/Agency	
	Description of Products & Services Provided	
Reference 2 (Current Transit Customer)	POC (Name, Email, Phone)	
	Company/Agency	
	Description of Products & Services Provided	
Reference 3 (Current Transit Customer)	POC (Name, Email, Phone)	
	Company/Agency	
	Description of Products & Services Provided	



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APPENDIX B: Template for Budgetary Estimate

Please use the template to provide estimated one-time and annual budgetary cost information about your products and services. (Please list as many items as you believe that is needed for a comprehensive solution. Be sure to also include the list of potential procurement deliverables requested in Section 4 above.)

One-Time Budgetary Estimate		
Item	Description	Est. Cost
1		
2		
3		
4		
5		
6		
7		
8		
Total		

Annual Budgetary Estimate		
Item	Description	Est. Cost
1		
2		
3		
4		
5		
6		
7		
8		
Total		



APPENDIX C: Template for RFI Responses

Please use the template to provide your responses to the questions and statements documented in section 3 Scope of Work of the RFI. (The vendor need not feel compelled to respond to every requirement or statement). Please feel free to provide additional comments that be will be helpful to WMATA.

Item	Vendor Responses to RFI Section 3.1 Functionality
1	
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	Additional Information:



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Item	Vendor Responses to RFI Section 3.2 Test Validation
1	
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8	
	Additional Information:



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Item	Vendor Responses to RFI Section 3.3 System Administration
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	Additional Information:



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Item	Vendor Responses to RFI Section 3.4 Reporting
1	
2	
3	
4	
5	
	Additional Information:

Item	Vendor Responses to RFI Section 3.5 Security
1	
2	
3	
4	
5	
	Additional Information:



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Item	Vendor Responses to RFI Section 3.6 Implementation
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	Additional Information:



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Item	Vendor Responses to RFI Section 3.7 Financial
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5	
	Additional Information:



Vendor Responses to RFI Section 3.8 Additional Information

<p>Include any information that will be helpful to WMATA in the successful installation and implementation of a bus operator assessment tool, such as best practices, changes and/or enhancements in the state of the art, and related information.</p>



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RFI RELATED QUESTIONS/CLARIFICATIONS/SUBMISSIONS

1. All questions related to this RFI should be directed via email to WMATA's Point of Contact (POC):

Angelina Mulenga
Contract Administrator
Washington Metropolitan Area Transit Authority (WMATA)
JGB/ Rm 3G-01
600 5th Street, NW
Washington DC 20001
202-962-1621
acmulenga@wmata.com

Deadline for addressing questions is February 14, 2018 @ 2pm EST

2. **Deadline for Receiving Responses from Vendors (All Materials)**

Vendors must ensure that the information is mailed or delivered to the following address on or before **March 7, 2018 @ 2pm EST** (no email responses will be accepted). The response shall include the RFI number and the WMATA POC name on the front of the package. Extensions to this date cannot be granted.

Washington Metropolitan Area Transit Authority (WMATA)
Attn: Angelina Mulenga
Contract Administrator
JGB/ Rm 3G-01
600 5th Street, NW
Washington DC 20001
RFI #

Participation in this RFI is voluntary and WMATA will not pay for the preparation of any information submitted by a vendor or for WMATA's use of that information.



SUBMISSIONS

Submission of Responses

- I. Use the following appendices for responding to this RFI:
 - 1) APPENDIX A: Template for Company Information
 - 2) APPENDIX B: Template for Budgetary Estimate
 - 3) APPENDIX C: Template for RFI Responses

All requests for information in all sections of this document must be answered as concisely as possible while providing all information necessary to understand the outsourcing process proposed. Any deviations from requirements, or requirements that cannot be satisfied by the vendor, must be clearly identified.

- II. Responses must include a statement indicating that the vendor understands the requirements of the RFI. The original response must be signed under the corporate seal by an authorized officer. The original and all copies, including all supplementary literature, must be forwarded to the point of contact identified in Section C of this RFI.
- III. Any information of a confidential or proprietary nature contained in a vendor response should be clearly marked 'PROPRIETARY' or 'CONFIDENTIAL' next to the item or at the top of each respective page.
- IV. All responses, once delivered, becomes the property of WMATA.
- V. If a particular answer is best presented as an attachment you may do so.



Response Format

In order to facilitate a timely and comprehensive review of all submitted responses, responses must be submitted using the format requested in this RFI. Any deviation from this format may lead to a delay in review. Vendors should limit the responses to the following questions to twenty (20) pages.

Vendor responses **MUST** provide the following information, on the title page in the requested sequence:

- a) Based on the information provided, would your firm respond to a RFP (if published) for all listed services?

Answer the following questions if the answer to question A is 'yes'. (See appendices for templates to use in submitting your RFI responses)

- b) Provide the name, title, address, telephone and e-mail for the primary contact for receiving an RFP.



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Rights and Obligations of WMATA

Reservation of rights:

WMATA reserves all rights (which rights shall be exercisable by WMATA in its sole discretion) available to it under applicable law, including without limitation, the following, with or without cause and with or without notice:

- The right to cancel, withdraw, postpone or extend the RFI in whole or in part at any time, without incurring any obligations or liabilities;
- The right to issue a new RFI;
- The right to reject any submittals and responses received at any time;
- The right to modify all dates set or projected in this RFI;
- The right to terminate evaluations of responses received at any time;
- The right to suspend and terminate this RFI at any time;
- The right to waive or permit corrections to data submitted with any response to this RFI;
- The right to issue addenda, supplements, and modifications to this RFI;
- The right to permit the submittal of addenda and supplements to data previously provided with any response to this RFI;
- The right to hold meetings, conduct discussions and draft correspondence with one or more of the Respondents responding to this RFI to seek an improved understanding of the responses to the RFI.
- The information and responses received in response to this RFI may be shared with other local and federal agencies at the discretion of WMATA.



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CONFIDENTIALITY & RFI OWNERSHIP

All responses to the RFI will become the property of WMATA and will not be returned.

WMATA shall not be liable for or suffer any consequential damages for any identified proprietary information. **Properly identified proprietary information will be safeguarded in accordance with WMATA regulations.** The purpose of this announcement is solely to gather information from the market place and any responses received will not be considered an offer by the responding party and cannot be returned. No telephone or email enquiries will be accepted and requests for solicitation packages will not be granted, as no solicitation has been prepared at this time.

All responsible businesses' responses will be considered by WMATA. This is **not** a solicitation for proposals, proposal abstracts or quotations. WMATA's Bus Planning Department is conducting market research for the purposes of identifying sources who have demonstrated capabilities in the area of providing Bus Operator Candidate Assessment Tool. No solicitation of offers is made by this RFI. Your responses to the information requested will assist WMATA in determining the appropriate acquisition method. WMATA will not be obligated to provide the services described herein and it is understood by WMATA that the cost estimates provided as a result of this request are "best" estimates only.