

PERFORMANCE-BASED CONTRACT TENDER SERVICES – TRANSPORTATION



**Massachusetts Bay
Transportation Authority**



The Massachusetts Bay Transportation Authority (the ‘MBTA’), more commonly known as the “T”, is one of the oldest public transit systems in the United States. It’s also the largest transit system in Massachusetts and provides subway, bus, Commuter Rail, ferry, and paratransit service to eastern Massachusetts and parts of Rhode Island. The MBTA transit network includes the [MBTA subway](#) with three [metro](#) lines ([Blue](#), [Orange](#), and [Red](#)), two [light rail](#) lines ([Green](#) and [Ashmont–Mattapan](#)), and a five-line [bus rapid transit](#) system (the [Silver Line](#)); [MBTA bus](#) local and express service; the twelve-line [MBTA Commuter Rail](#) system, and [several ferry routes](#). Annual ridership is approximately 240M, making it the [fourth-busiest rapid transit system](#), the [third-busiest light rail system](#), and the fifth-busiest commuter rail system in the U.S. The MBTA transit system encompasses approximately 190 transit stations and another 100 office and non-transit facilities totaling approximately 3.6M sf of cleanable space throughout the greater Boston metropolitan area. Many of its facilities operate on a 24 / 7 365 basis.

BACKGROUND

In 2017, the MBTA (the “T”) authorized STV, its engineering consultant of record, to engage Elliott Affiliates, Ltd. for assistance in the development and tender of a new performance-based janitorial and snow clearing services contract for their rail, bus and administrative facilities in the Boston metroplex. An internal Stakeholder Team was established with the overarching goal of improving the ridership and occupant satisfaction experience with the overall cleanliness of the “T’s” transit system and its support facilities.

In September 2017, Elliott conducted an initial Benchmark Survey that indicated the actual overall cleanliness of the “T” facilities was only 55.2%, well below this industry segment’s cleanliness average of 70%+. Elliott’s subsequent Focus Group survey of the “T” Stakeholder Team resulted in new, but achievable cleanliness target of 71.5% in year one for cleanliness, as well as increases in occupant satisfaction, ATP testing thresholds (for residual *organic* loads) and demonstrable continuous improvements in the contractors’ own cleaning processes & procedures. Following their establishment of new required performance *outcomes*, the Stakeholder Team created a comprehensive tender package that provided all prospective bidders with a specific, objective, measurable Scope of Work that clearly described the “T’s” required *outcomes* for janitorial and snow clearing services that would be provided to all of their facilities except their ‘rolling stock’.

CLIENT OBJECTIVES

- Comply with all MBTA procurement guidelines
- Ensure all required janitorial & facilities services workstreams meet MBTA’s financial, service delivery, best practices goals and diversity guidelines
- Create a performance-based SOW that incents the selected contractor(s) to *continuously deliver* the MBTA’s required performance outcomes
- Formalize all aspects & engagement components related to the solicitation, tender and award of janitorial and snow clearing services that can also serve as a template for future tender initiatives.
- Ensure that the 24 / 7 / 365 operation of all MBTA facilities is not adversely impacted by any activities related to the performance (or non-performance) of the required SOW for this tender initiative.





STRATEGY

The Stakeholder team's principal objective was to develop an SOW that would ensure new cleanliness, ridership, and occupant satisfaction goals while ensuring that the infrastructure described in this new SOW was as current and specific as possible. Because the environment within which janitorial services were to be performed is unique and highly specific to *this segment of the transportation industry*, updating all infrastructure plans, identifying specific demarcation points, and articulating the operational conditions that must be considered required significant coordination from all MBTA operational groups. In addition, coordination with local, state, and federal agencies with various oversight responsibilities (including the MBTA Board of Directors) was an important requirement for a successful tender initiative. Because this tender would be submitted through COMMBuys (the official procurement record system for the Commonwealth of Massachusetts), the entire tender process had to comply with all Commonwealth of Massachusetts procurement guidelines.

Commencing in the fall of 2017 through the launch of this RFP in March 2019 the Stakeholder team met, initially on a monthly and eventually weekly basis, to ensure all components of this RFP accurately described both the performance requirements & its measurement methodology as well as the environments within which the services were to be delivered. Ultimately this RFP was structured to allow prospective bidders to propose on any combination of four different 'regions' established by the MBTA that included stations (indoor as well as outdoor), bus transit stops (principally outdoor) and non-transit facilities. The MBTA evaluated all design proposals based on formal, objective scoring criteria established by the Stakeholder team, following all guidelines for contract awards required by the Commonwealth of Massachusetts.

THE PROCESS

- Review, update & incorporate all existing physical environment plans (principally through STV)
- Define all required SOW services in specific measurable terms
- Define the contract "deliverables" (the *outcomes* for performing a specific service or workstream) in measurable terms
- Create all contract SOW engagement documents in concert with the MBTA's facilities, legal & procurement teams
- Create clear, measurable KPIs that are directly tied to the successful bidders' compensation
- Incorporate requirements for quantifiable "best practices" in each bidder's Design Proposals
- Incorporate requirements for "continuous improvement" processes and "deliverables" in bidder Design Proposals
- Standardize all RFP submission deliverables & protocols (ensuring objectivity in evaluating of each bidder's design proposal) via COMMBuys
- Create an objective, empirical methodology for bidder design proposal evaluation
- Provide detailed evaluation of all bid submissions with a final best proposal recommendation

RESULTS

In concert with the "T" internal Stakeholder teams, three (3) contractors ultimately submitted final cleaning system and snow clearing design proposals. While no contractor's bid submission completely addressed all components of this RFP, the submission process, allowing contractors to submit proposals for all or part of the SOW, permitted Elliott to evaluate which *combination of design proposals* were the best for their required outcomes. Because the significant initial 'investment' of time and expertise resulted in more *specific and measurable outcome expectations*, including a)-detailed descriptions of each aspect of the SOW, b)-engineering site plans delineating specific snow clearing parameters for each unique facility and station, and c)-a detailed and quantifiable description of how performance was to be measured and would be compensated, the final cost to the "T" when this contract was awarded was less than 2% of their previous contract cost. The Stakeholder team composition further ensured that the new performance targets reflected the entire organization's vision and mission.



SUMMARY

Public sector organizations that operate solely for the benefit of their customers face unique challenges, including ensuring 1)-operational reliability, 2)-public safety, 3)-cost competitive efficiencies, and 4)-ease of use, all within a welcoming environment that is clean and inviting. The MBTA engaged Elliott Affiliates, Ltd. to facilitate defining these expectations in an objective, measurable format that would deliver the cleanliness expectations of their ridership while complying with all required Commonwealth of Massachusetts guidelines. This collaboration resulted in the “T” executing the most comprehensive Janitorial and Snow Clearing Services contract in their almost 200-year history.

About Elliott Affiliates, Ltd.

Elliott Affiliates, Ltd. (EALTD) is an active provider of janitorial consulting, advisory, inspection, and performance management services. Founded in 1973, we were one of the earliest developers of the performance-based cleaning strategy and have reviewed, created, or modified over 530 of these contracts over the years. Elliott Affiliates, Ltd. is a chartered Maryland corporation and a 100% woman-owned business (WBE).

- [Elliott's RFP/Bid Advisor](#): Provides buyers with a range of services spanning the RFP process.
- [Elliott's eSpecX](#): Makes it easy to create a custom cleaning program, optimized for your best results in minutes.
- [Elliott's EA-Inspect](#): Provides custom inspection service app to monitor and improve the performance of your cleaning program.

To schedule a free consultation, please email us at project-admin@ealtd.com

