

Appendix B - Bike Share Operations - Instructions located on the last page

*E=Essential; *D=Desirable

Ref	Element	Level of Importance*	Type
System Operations			
1 General			
1.01	Provide a detailed operation plan documenting inspection schedule and maintenance standards . The Operations Plan should address all of the elements listed in this Appendix as "Essential" as well as address those listed as "Desirable", if they are met.	-	Narrative
1.02	Indicate the address in which your main office would be located.	-	Narrative
1.03	Describe how many facilities you will have for warehousing, customer service, operations and manufacturing. For all facilities located in the Bay Area, provide addresses and City, and indicate whether you own or currently have existing long-term lease agreements in place. In not, what is the timeline for securing space?	-	Narrative
1.04	The Program Administrator will require a signed agreement of every property that agrees to allow Bike Share Equipment to be located on their site. Do you agree to provide this notification to the Program Administrator prior to delivering any equipment to that site?	E	Yes/No/NA
2 Fleet Redistribution			
2.01	Describe your system for maintaining a well balanced fleet and minimizing the likelihood customers will encounter empty or full stations including any suitable or environmentally-friendly strategies that may be employed.	-	Narrative
2.02	Estimate the frequency that bikes would need to be rebalanced in each city.	-	Narrative
2.03	Estimate the number of maintenance/rebalancing employees you will have and number and type of vehicles (including fuel type) needed for maintenance/rebalancing.	-	Narrative
2.04	Indicate the ratio of "spare" bikes to "in-service" bikes available to replace bikes taken out for maintenance, repair or bikes that are missing or stolen.	-	Narrative
2.05	Describe any mechanisms or strategies (i.e. dynamic pricing) for encouraging a natural system-wide balancing to reduce the need for rebalancing.	-	Narrative
2.06	Will you use electric, hybrid or other environmentally friendly vehicles/strategies for redistribution of bikes? If any, list types.	D	Yes/No/NA
2.07	Provide additional information or comments that have not already been described.	-	Narrative
Maintenance			
3 General			

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3.01	Provide a description of established standards for maintenance of all Bike Share System Equipment, the schedule for routine maintenance, cleaning and repair of bicycles and stations; as well as an audit procedure ensuring compliance with these standards.	-	Narrative
3.02	Describe the process including the notification or metrics system that will be used to determine where and when bicycles need repair or replacement.	-	Narrative
3.03	Explain how you will manage and coordinate bicycle repair and respond to service and maintenance requests and alerts in five cities or more.	-	Narrative
3.04	Describe all repairs that can be made "in the field" at stations.	-	Narrative
3.05	Explain how you will manage and coordinate bicycle repair, tracking, and repossession of bicycles that are not returned within 24 hours.	-	Narrative
3.06	Will your staff record and keep a log of maintenance activities such as number of bicycle replacements, repairs, out-of-service bikes, etc.?	D	Yes/No/NA
3.07	Will you have a satellite location, one for each of the three counties, with the necessary maintenance vehicles and staff assigned to each county?	D	Yes/No/NA
3.08	Will your maintenance vehicles be equipped with a light bar or arrow board when needing to occupy a travel lane?	E	Yes/No/NA
3.09	Describe safety precautions and measures that are employed to ensure field staff are safe.	E	Narrative
3.1	Provide additional information or comments related to Maintenance that have not already been described.	-	Narrative
Outreach			
4 Customer service			
4.01	Will your customer service plan include staff, service hours, 24/7 call center, on-call support, and web support?	-	Yes/No/NA
4.02	Describe the system by which your company can provide immediate aid to users with mechanical or subscription issues.	-	Narrative
4.03	Will you provide a customer service telephone number and email address on the website, the kiosks and every bike (with durable, weather resistant labels)?	E	Yes/No/NA
4.04	Will the customer service center will be located in the Bay Area?	D	Yes/No/NA

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4.05	Will your customer service staff be able to support Spanish and Chinese languages?	E	Yes/No/NA
4.06	List the <u>other</u> languages that your customer service staff will be able to support	-	Narrative
4.07	Provide additional information or comments related to Customer Service that have not already been described.	-	Narrative
5 Promotions, Marketing and Branding			
5.01	Describe how you plan to promote the program prior to launch of the bike share system.	-	Narrative
5.02	Describe initial and on-going strategies to promote the bike share program prior to on-the-ground deployment. Include any relevant detail such as: proposed timeline, identification of key agencies/groups/companies to promote to, tools for information dissemination, innovative strategies unique to your company, etc.	-	Narrative
5.03	Describe promotions and marketing strategies to drive subscription sales and increase membership and users.	-	Narrative
5.04	Describe how you will develop and distribute subscription materials including information packets related to passes and promotions?	E	Narrative
5.05	Describe strategies that you would employ to address barriers to membership faced by low income populations who lack access to credit.	-	Narrative
5.06	Many of the pilot areas have thriving traditional bicycle rental industry that is concerned about potential competition from bike sharing despite its different pricing structure. Describe your ideas for and/or experience with marketing techniques and strategies to steer tourists seeking long-term rentals away from the bike sharing system to a local bicycle rental company.	-	Narrative
5.07	The pilot is funded in part by the Air District, Program Partners and the Metropolitan Transportation Commission. These agencies require that marketing and promotions be coordinated with their own efforts and programs. Additionally, some agencies have specific limitations on advertising (e.g. prohibitions against materials featuring tobacco or alcohol) and limitations on advertising in public spaces. Do you agree to cooperate with local marketing and promotions efforts, including pre-approval of all of your collateral materials?	-	Yes/No/NA
5.08	Contractor shall develop the bike share brand including look and messages. Provide a description and images of proposed Branding and/or a plan for developing Branding.	-	Narrative
5.09	Provide additional information or comments related to Promotions , Marketing and Branding that have not already been described.	-	Narrative

Business Plan

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6	General		
6.01	Describe your proposed business model for operating a self-sufficient bike sharing program that does not rely on ongoing government funding.	-	Narrative
6.02	Describe how your business plan calculates and ensures bike availability and meets demand. Provide the following: total number of bikes in use at a given time during peak hours; percent of total bikes in use at a given time during peak hours; percentage of stations with no available bikes during peak hours; percentage of stations with no empty spaces available to accept bike return.	-	Narrative
6.03	Indicate if your business model includes working with local businesses to perform any maintenance, operation, and/or marketing tasks. Describe the type of local business(es) and related tasks.	-	Narrative
6.04	Describe how your business plan calculates the optimal system size (please note the different markets and deployment strategies in each community). Please include number of stations, number of bikes, ratio of bike docks to bikes, ratio of bikes to stations, average number of stations per square mile, average distance between stations, and average number of subscribers to bikes.	-	Narrative
6.04	Showing the methodology and assumptions, provide ridership estimates for years one through five including: i) Total trips per year; ii) Total subscribers; iii) Average daily users; iv) Average daily trips; v) Total trips by month; vi) Percentage of total trips originating and terminating within each city.	-	Narrative
6.05	Provide a proposal for expansion within each Pilot city and into new communities in the Bay Area. In particular, please include: i) Timeline for rollout; ii) Estimated number of bikes and stations; iii) Amount of capital and operational funds needed.	-	Narrative
6.06	Provide additional information or comments related to your Business Plan that have not already been described.	-	Narrative
Financial Plan			
7	General		
7.01	Provide a draft proposed budget for the first five years that bike share is in operation (shown by year). Provide a budget for the fleet with 1,000 bikes over five years and another budget that assumes a growth in fleet over the five years. Budget should include all expected expenses including start-up, operating, and any subcontractor fees. Provide a line item budget for all labor and equipment	-	Narrative
7.02	Provide proposed fee structure for membership and user fees (including deposits). Membership and user fees should be comparable to current bike sharing systems operating around the world .	-	Narrative

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7.03	Provide cash flow projections for expected revenue years one to five. Identify known and potential revenue sources such as user fees and/or sponsorships. Provide detailed description of revenue generating strategies to ensure positive net cash flow each year.	-	Narrative
7.04	Provide a description of your experience handling Federal accounting requirements and a description of process to track revenue and expedites appropriately.	-	Narrative
7.05	Provide additional information or comments related to your Financial Plan that have not already been described.	-	Narrative
1. For items categorized as Narrative in Column "Type", proposers should provide a written response ; proposers may include, if applicable, images, diagrams etc.			
2. For items categorized as YES/NO/NA in Column Type, proposers should answer either "Yes", "No," or "Not Applicable (NA)" to indicate if such proposal can provide or adhere to the particular element(s). Such answers are defined as:			
a. Yes = Yes, the proposing firm can provide this feature or function;			
b. No = No, the proposing firm cannot provide this feature or function for reasons explained in the Comments/Explanation column (Column 5);			
c. NA = This feature or function is not applicable for reasons explained in the Comments/Explanation column (Column 5).			