



**THE CITY OF WINNIPEG**

# **BID OPPORTUNITY**

**BID OPPORTUNITY NO. 487-2014**

**PROVISION OF MARKET RESEARCH SURVEY**

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## **PART B - BIDDING PROCEDURES**

### **B1. CONTRACT TITLE**

B1.1 PROVISION OF MARKET RESEARCH SURVEY

### **B2. SUBMISSION DEADLINE**

B2.1 The Submission Deadline is 4:00 p.m. Winnipeg time, June 12, 2014.

B2.2 Bids determined by the Manager of Materials to have been received later than the Submission Deadline will not be accepted and will be returned upon request.

B2.3 The Contract Administrator or the Manager of Materials may extend the Submission Deadline by issuing an addendum at any time prior to the time and date specified in B2.1.

### **B3. ENQUIRIES**

B3.1 All enquiries shall be directed to the Contract Administrator identified in D4.1.

B3.2 If the Bidder finds errors, discrepancies or omissions in the Bid Opportunity, or is unsure of the meaning or intent of any provision therein, the Bidder shall promptly notify the Contract Administrator of the error, discrepancy or omission at least five (5) Business Days prior to the Submission Deadline.

B3.3 If the Bidder is unsure of the meaning or intent of any provision therein, the Bidder should request clarification as to the meaning or intent prior to the Submission Deadline.

B3.4 Responses to enquiries which, in the sole judgment of the Contract Administrator, require a correction to or a clarification of the Bid Opportunity will be provided by the Contract Administrator to all Bidders by issuing an addendum.

B3.5 Responses to enquiries which, in the sole judgment of the Contract Administrator, do not require a correction to or a clarification of the Bid Opportunity will be provided by the Contract Administrator only to the Bidder who made the enquiry.

B3.6 The Bidder shall not be entitled to rely on any response or interpretation received pursuant to B3 unless that response or interpretation is provided by the Contract Administrator in writing.

### **B4. CONFIDENTIALITY**

B4.1 Information provided to a Bidder by the City or acquired by a Bidder by way of further enquiries or through investigation is confidential. Such information shall not be used or disclosed in any way without the prior written authorization of the Contract Administrator. The use and disclosure of the confidential information shall not apply to information which:

- (a) was known to the Bidder before receipt hereof; or
- (b) becomes publicly known other than through the Bidder; or
- (c) is disclosed pursuant to the requirements of a governmental authority or judicial order.

B4.2 The Bidder shall not make any statement of fact or opinion regarding any aspect of the Bid Opportunity to the media or any member of the public without the prior written authorization of the Contract Administrator.

### **B5. ADDENDA**

B5.1 The Contract Administrator may, at any time prior to the Submission Deadline, issue addenda correcting errors, discrepancies or omissions in the Bid Opportunity, or clarifying the meaning or intent of any provision therein.

- B5.2 The Contract Administrator will issue each addendum at least two (2) Business Days prior to the Submission Deadline, or provide at least two (2) Business Days by extending the Submission Deadline.
- B5.2.1 Addenda will be available on the Bid Opportunities page at The City of Winnipeg, Corporate Finance, Materials Management Division website at <http://www.winnipeg.ca/matmgt/bidopp.asp>
- B5.2.2 The Bidder is responsible for ensuring that he/she has received all addenda and is advised to check the Materials Management Division website for addenda regularly and shortly before the Submission Deadline, as may be amended by addendum.
- B5.3 The Bidder shall acknowledge receipt of each addendum in Paragraph 8 of Form A: Bid. Failure to acknowledge receipt of an addendum may render a Bid non-responsive.

## **B6. SUBSTITUTES**

- B6.1 The Work is based on the Plant, Materials and methods specified in the Bid Opportunity.
- B6.2 Substitutions shall not be allowed unless application has been made to and prior approval has been granted by the Contract Administrator in writing.
- B6.3 Requests for approval of a substitute will not be considered unless received in writing by the Contract Administrator at least five (5) Business Days prior to the Submission Deadline.
- B6.4 The Bidder shall ensure that any and all requests for approval of a substitute:
- (a) provide sufficient information and details to enable the Contract Administrator to determine the acceptability of the Plant, Material or method as either an approved equal or alternative;
  - (b) identify any and all changes required in the applicable Work, and all changes to any other Work, which would become necessary to accommodate the substitute;
  - (c) identify any anticipated cost or time savings that may be associated with the substitute;
  - (d) certify that, in the case of a request for approval as an approved equal, the substitute will fully perform the functions called for by the general design, be of equal or superior substance to that specified, is suited to the same use and capable of performing the same function as that specified and can be incorporated into the Work, strictly in accordance with the proposed work schedule and the dates specified in the Supplemental Conditions for Substantial Performance and Total Performance;
  - (e) certify that, in the case of a request for approval as an approved alternative, the substitute will adequately perform the functions called for by the general design, be similar in substance to that specified, is suited to the same use and capable of performing the same function as that specified and can be incorporated into the Work, strictly in accordance with the proposed work schedule and the dates specified in the Supplemental Conditions for Substantial Performance and Total Performance.
- B6.5 The Contract Administrator, after assessing the request for approval of a substitute, may in his/her sole discretion grant approval for the use of a substitute as an "approved equal" or as an "approved alternative", or may refuse to grant approval of the substitute.
- B6.6 The Contract Administrator will provide a response in writing, at least two (2) Business Days prior to the Submission Deadline, only to the Bidder who requested approval of the substitute.
- B6.6.1 The Bidder requesting and obtaining the approval of a substitute shall be entirely responsible for disseminating information regarding the approval to any person or persons he/she wishes to inform.
- B6.7 If the Contract Administrator approves a substitute as an "approved equal", any Bidder may use the approved equal in place of the specified item.

- B6.8 If the Contract Administrator approves a substitute as an “approved alternative”, any Bidder bidding that approved alternative may base his/her Total Bid Price upon the specified item but may also indicate an alternative price based upon the approved alternative. Such alternatives will be evaluated in accordance with B14.
- B6.9 No later claim by the Contractor for an addition to the Total Bid Price because of any other changes in the Work necessitated by the use of an approved equal or an approved alternative will be considered.
- B6.10 Notwithstanding B6.2 to B6.9, and in accordance with B7.5, deviations inconsistent with the Bid Opportunity document shall be evaluated in accordance with B14.1(a).

## **B7. BID SUBMISSION**

- B7.1 The Bid shall consist of the following components:
- (a) Form A: Bid;
  - (b) Form B: Prices.
- B7.2 Further to B7.1, the Bidder should include the written correspondence from the Contract Administrator approving a substitute in accordance with B6.
- B7.3 All components of the Bid shall be fully completed or provided, and submitted by the Bidder no later than the Submission Deadline, with all required entries made clearly and completely in ink, to constitute a responsive Bid.
- B7.4 Bidders are advised not to include any information/literature except as requested in accordance with B7.1.
- B7.5 Bidders are advised that inclusion of terms and conditions inconsistent with the Bid Opportunity document, including the General Conditions, will be evaluated in accordance with B14.1(a)
- B7.6 The Bid may be submitted by mail, courier or personal delivery, or by facsimile transmission.
- B7.7 If the Bid is submitted by mail, courier or personal delivery, it shall be enclosed and sealed in an envelope clearly marked with the Bid Opportunity number and the Bidder's name and address, and shall be submitted to:
- The City of Winnipeg  
Corporate Finance Department  
Materials Management Division  
185 King Street, Main Floor  
Winnipeg MB R3B 1J1
- B7.7.1 Samples or other components of the Bid which cannot reasonably be enclosed in the envelope may be packaged separately, but shall be clearly marked with the Bid Opportunity number, the Bidder's name and address, and an indication that the contents are part of the Bidder's Bid Submission.
- B7.8 If the Bid is submitted by facsimile transmission, it shall be submitted to 204- 949-1178.
- B7.8.1 The Bidder is advised that the City cannot take responsibility for the availability of the facsimile machine at any time.
- B7.9 Bids submitted by internet electronic mail (e-mail) will not be accepted.

## **B8. BID**

- B8.1 The Bidder shall complete Form A: Bid, making all required entries.
- B8.2 Paragraph 2 of Form A: Bid shall be completed in accordance with the following requirements:

- (a) if the Bidder is a sole proprietor carrying on business in his/her own name, his/her name shall be inserted;
- (b) if the Bidder is a partnership, the full name of the partnership shall be inserted;
- (c) if the Bidder is a corporation, the full name of the corporation shall be inserted;
- (d) if the Bidder is carrying on business under a name other than his/her own, the business name and the name of every partner or corporation who is the owner of such business name shall be inserted.

B8.2.1 If a Bid is submitted jointly by two or more persons, each and all such persons shall identify themselves in accordance with B8.2.

B8.3 In Paragraph 3 of Form A: Bid, the Bidder shall identify a contact person who is authorized to represent the Bidder for purposes of the Bid.

B8.4 Paragraph 10 of Form A: Bid shall be signed in accordance with the following requirements:

- (a) if the Bidder is a sole proprietor carrying on business in his/her own name, it shall be signed by the Bidder;
- (b) if the Bidder is a partnership, it shall be signed by the partner or partners who have authority to sign for the partnership;
- (c) if the Bidder is a corporation, it shall be signed by its duly authorized officer or officers;
- (d) if the Bidder is carrying on business under a name other than his/her own, it shall be signed by the registered owner of the business name, or by the registered owner's authorized officials if the owner is a partnership or a corporation.

B8.4.1 The name and official capacity of all individuals signing Form A: Bid should be printed below such signatures.

B8.4.2 All signatures shall be original.

B8.5 If a Bid is submitted jointly by two or more persons, the word "Bidder" shall mean each and all such persons, and the undertakings, covenants and obligations of such joint Bidders in the Bid and the Contract, when awarded, shall be both joint and several.

## **B9. PRICES**

B9.1 The Bidder shall state the lump sum price in Canadian funds for the Work on Form B: Prices.

B9.1.1 Notwithstanding C11.1.3, the price on Form B: Prices shall not include the Goods and Services Tax (GST) or Manitoba Retail Sales Tax (MRST, also known as PST), which shall be extra where applicable.

B9.2 Payments to Non-Resident Contractors are subject to Non-Resident Withholding Tax pursuant to the Income Tax Act (Canada).

## **B10. QUALIFICATION**

B10.1 The Bidder shall:

- (a) undertake to be in good standing under The Corporations Act (Manitoba), or properly registered under The Business Names Registration Act (Manitoba), or otherwise properly registered, licensed or permitted by law to carry on business in Manitoba, or if the Bidder does not carry on business in Manitoba, in the jurisdiction where the Bidder does carry on business; and
- (b) be financially capable of carrying out the terms of the Contract; and
- (c) have all the necessary experience, capital, organization, and equipment to perform the Work in strict accordance with the terms and provisions of the Contract.

- B10.2 The Bidder and any proposed Subcontractor (for the portion of the Work proposed to be subcontracted to them) shall:
- (a) be responsible and not be suspended, debarred or in default of any obligations to the City. A list of suspended or debarred individuals and companies is available on the Information Connection page at The City of Winnipeg, Corporate Finance, Materials Management Division website at <http://www.winnipeg.ca/matmgt/debar.stm>
- B10.3 The Bidder and/or any proposed Subcontractor (for the portion of the Work proposed to be subcontracted to them) shall:
- (a) have successfully carried out work similar in nature, scope and value to the Work; and
  - (b) be fully capable of performing the Work required to be in strict accordance with the terms and provisions of the Contract; and
  - (c) have a written workplace safety and health program, if required, pursuant to The Workplace Safety and Health Act (Manitoba).
- B10.4 The Bidder shall submit, within three (3) Business Days of a request by the Contract Administrator, proof satisfactory to the Contract Administrator of the qualifications of the Bidder and of any proposed Subcontractor.
- B10.5 The Bidder shall provide, on the request of the Contract Administrator, full access to any of the Bidder's equipment and facilities to confirm, to the Contract Administrator's satisfaction, that the Bidder's equipment and facilities are adequate to perform the Work.

## **B11. OPENING OF BIDS AND RELEASE OF INFORMATION**

- B11.1 Bid Submissions will not be opened publicly.
- B11.2 Following the Submission Deadline, the names of the Bidders and their Total Bid Prices (unevaluated, and pending review and verification of conformance with requirements) will be available on the Closed Bid Opportunities (or Public/Posted Opening & Award Results) page at The City of Winnipeg, Corporate Finance, Materials Management Division website at <http://www.winnipeg.ca/matmgt/>
- B11.3 After award of Contract, the name(s) of the successful Bidder(s) and the Contract amount(s) will be available on the Closed Bid Opportunities (or Public/Posted Opening & Award Results) page at The City of Winnipeg, Corporate Finance, Materials Management Division website at <http://www.winnipeg.ca/matmgt/>
- B11.4 The Bidder is advised that any information contained in any Bid may be released if required by City policy or procedures, The Freedom of Information and Protection of Privacy Act (Manitoba), or by other authorities having jurisdiction.

## **B12. IRREVOCABLE BID**

- B12.1 The Bid(s) submitted by the Bidder shall be irrevocable for the time period specified in Paragraph 9 of Form A: Bid.
- B12.2 The acceptance by the City of any Bid shall not release the Bids of the next two lowest evaluated responsive Bidders and these Bidders shall be bound by their Bids on such Work for the time period specified in Paragraph 9 of Form A: Bid.

## **B13. WITHDRAWAL OF BIDS**

- B13.1 A Bidder may withdraw his/her Bid without penalty by giving written notice to the Manager of Materials at any time prior to the Submission Deadline.
- B13.1.1 Notwithstanding C22.5, the time and date of receipt of any notice withdrawing a Bid shall be the time and date of receipt as determined by the Manager of Materials.

- B13.1.2 The City will assume that any one of the contact persons named in Paragraph 3 of Form A: Bid or the Bidder's authorized representatives named in Paragraph 10 of Form A: Bid, and only such person, has authority to give notice of withdrawal.
- B13.1.3 If a Bidder gives notice of withdrawal prior to the Submission Deadline, the Manager of Materials will:
- (a) retain the Bid until after the Submission Deadline has elapsed;
  - (b) open the Bid to identify the contact person named in Paragraph 3 of Form A: Bid and the Bidder's authorized representatives named in Paragraph 10 of Form A: Bid; and
  - (c) if the notice has been given by any one of the persons specified in B13.1.3(b), declare the Bid withdrawn.
- B13.2 A Bidder who withdraws his/her Bid after the Submission Deadline but before his/her Bid has been released or has lapsed as provided for in B12.2 shall be liable for such damages as are imposed upon the Bidder by law and subject to such sanctions as the Chief Administrative Officer considers appropriate in the circumstances. The City, in such event, shall be entitled to all rights and remedies available to it at law.

#### **B14. EVALUATION OF BIDS**

- B14.1 Award of the Contract shall be based on the following bid evaluation criteria:
- (a) compliance by the Bidder with the requirements of the Bid Opportunity, or acceptable deviation therefrom (pass/fail);
  - (b) qualifications of the Bidder and the Subcontractors, if any, pursuant to B10 (pass/fail);
  - (c) Total Bid Price;
  - (d) economic analysis of any approved alternative pursuant to B6.
- B14.2 Further to B14.1(a), the Award Authority may reject a Bid as being non-responsive if the Bid Submission is incomplete, obscure or conditional, or contains additions, deletions, alterations or other irregularities. The Award Authority may reject all or any part of any Bid, or waive technical requirements or minor informalities or irregularities if the interests of the City so require.
- B14.3 Further to B14.1(b), the Award Authority shall reject any Bid submitted by a Bidder who does not demonstrate, in his/her Bid or in other information required to be submitted, that he/she is responsible and qualified.
- B14.4 Further to B14.1(c), the Total Bid Price shall be the lump sum price shown on Form B: Prices.
- B14.5 This Contract will be awarded as a whole.

#### **B15. AWARD OF CONTRACT**

- B15.1 The City will give notice of the award of the Contract or will give notice that no award will be made.
- B15.2 The City will have no obligation to award a Contract to a Bidder, even though one or all of the Bidders are determined to be responsible and qualified, and the Bids are determined to be responsive.
- B15.2.1 Without limiting the generality of B15.2, the City will have no obligation to award a Contract where:
- (a) the prices exceed the available City funds for the Work;
  - (b) the prices are materially in excess of the prices received for similar work in the past;
  - (c) the prices are materially in excess of the City's cost to perform the Work, or a significant portion thereof, with its own forces;
  - (d) only one Bid is received; or



(e) in the judgment of the Award Authority, the interests of the City would best be served by not awarding a Contract.

B15.3 Where an award of Contract is made by the City, the award shall be made to the responsible and qualified Bidder submitting the lowest evaluated responsive Bid in accordance with B14 .

B15.3.1 Following the award of contract, a Bidder will be provided with information related to the evaluation of his/her Bid upon written request to the Contract Administrator.

B15.4 Notwithstanding C4.1, the City may issue a Purchase Order to the successful Bidder in lieu of the execution of a Contract.

B15.5 The Contract Documents, as defined in C1.1(n)(ii), in their entirety shall be deemed to be incorporated in and to form a part of the Purchase Order notwithstanding that they are not necessarily attached to or accompany said Purchase Order.

## PART C - GENERAL CONDITIONS

### C0. GENERAL CONDITIONS

- C0.1 The *General Conditions for Supply of Services* (Revision 2007 04 12) are applicable to the Work of the Contract.
- C0.1.1 The *General Conditions for Supply of Services* are available on the Information Connection page at The City of Winnipeg, Corporate Finance, Materials Management Division website at [http://www.winnipeg.ca/matmgt/gen\\_cond.stm](http://www.winnipeg.ca/matmgt/gen_cond.stm)
- C0.2 A reference in the Bid Opportunity to a section, clause or subclause with the prefix “**C**” designates a section, clause or subclause in the *General Conditions for Supply of Services*.

## PART D - SUPPLEMENTAL CONDITIONS

### GENERAL

#### D1. GENERAL CONDITIONS

D1.1 In addition to the *General Conditions for Supply of Services*, these Supplemental Conditions are applicable to the Work of the Contract.

#### D2. SCOPE OF WORK

D2.1 The Work to be done under the Contract shall consist of conducting a market research survey and submitting the results to the City of Winnipeg Transit Department.

#### D3. DEFINITIONS

D3.1 When used in this Bid Opportunity:

- (a) "**Handi-Transit**" means a service of Winnipeg's public transit system that provides door-to-door transportation for people who are unable to regularly use the City's fixed route transit system because they are legally blind, have a physical disability that significantly impairs their mobility, or has Alzheimer's Disease or related dementia which interferes with their ability to use the regular fixed route transit;
- (b) "**Ambulatory**" means the capability of walking, with or without the aid of a mobility device such as a cane or walker;
- (c) "**Non-ambulatory**" means travel requires the use of a wheelchair or scooter.

#### D4. CONTRACT ADMINISTRATOR

D4.1 The Contract Administrator is:

Phil Wiwchar  
Market Research Analyst  
Telephone No. 204-986-5742  
Facsimile No. 204-986-6863

#### D5. CONTRACTOR'S SUPERVISOR

D5.1 Further to C6.19, the Contractor shall employ and keep on the Work, at all times during the performance of the Work, a competent supervisor and assistants, if necessary, acceptable to the Contract Administrator. The supervisor shall represent the Contractor on the Site. The supervisor shall not be replaced without the prior consent of the Contract Administrator unless the supervisor proves to be unsatisfactory to the Contractor and ceases to be in his/her employ.

D5.2 Before commencement of Work, the Contractor shall identify his/her designated supervisor and any additional personnel representing the Contractor and their respective roles and responsibilities for the Work.

D5.2.1 Further to C5.5 Contract Administrator may give instructions or orders to the Contractor's supervisor and such instructions or orders shall be deemed to have been given to the Contractor.

#### D6. OWNERSHIP OF INFORMATION, CONFIDENTIALITY AND NON DISCLOSURE

D6.1 The Contract, all deliverables produced or developed, and information provided to or acquired by the Contractor are the property of the City and shall not be appropriated for the Contractors own use, or for the use of any third party.

- D6.2 The Contractor shall not make any public announcements or press releases regarding the Contract, without the prior written authorization of the Contract Administrator.
- D6.3 The following shall be confidential and shall not be disclosed by the Contractor to the media or any member of the public without the prior written authorization of the Contract Administrator;
- (a) information provided to the Contractor by the City or acquired by the Contractor during the course of the Work;
  - (b) the Contract, all deliverables produced or developed; and
  - (c) any statement of fact or opinion regarding any aspect of the Contract.
- D6.4 A Contractor who violates any provision of D6 may be determined to be in breach of Contract.

## **D7. NOTICES**

- D7.1 Notwithstanding C22.3, all notices of appeal to the Chief Administrative Officer shall be sent to the attention of the Chief Financial Officer at the following facsimile number:

The City of Winnipeg  
Chief Financial Officer

Facsimile No.: 204-949-1174

## **SUBMISSIONS**

### **D8. AUTHORITY TO CARRY ON BUSINESS**

- D8.1 The Contractor shall be in good standing under The Corporations Act (Manitoba), or properly registered under The Business Names Registration Act (Manitoba), or otherwise properly registered, licensed or permitted by law to carry on business in Manitoba, or if the Contractor does not carry on business in Manitoba, in the jurisdiction where the Contractor does carry on business, throughout the term of the Contract, and shall provide the Contract Administrator with evidence thereof upon request.

## **SCHEDULE OF WORK**

### **D9. COMMENCEMENT**

- D9.1 The Contractor shall not commence any Work until he/she is in receipt of a notice of award from the City authorizing the commencement of the Work.
- D9.2 The Contractor shall not commence any Work until:
- (a) the Contract Administrator has confirmed receipt and approval of evidence of authority to carry on business specified in D8.
  - (b) the Contractor has attended a meeting with the Contract Administrator, or the Contract Administrator has waived the requirement for a meeting.

### **D10. WORK SCHEDULE**

- D10.1 The survey shall be performed during the period of September 13, 2014 to September 28, 2014, inclusive.
- D10.2 The Contractor shall complete the Work and deliver the results as outlined in E3 to Winnipeg Transit by October 8, 2014.

## **MEASUREMENT AND PAYMENT**

### **D11. INVOICES**

D11.1 Further to C11, the Contractor shall submit an invoice for each portion of Work performed to:

Winnipeg Transit  
Attention: Phil Wiwchar  
421 Osborne Street  
Winnipeg MB R3L 2A2

Facsimile No.: 204-986-6863  
Email: [pwiwchar@winnipeg.ca](mailto:pwiwchar@winnipeg.ca)

D11.2 Invoices must clearly indicate, as a minimum:

- (a) the City's purchase order number;
- (b) date of delivery;
- (c) delivery address;
- (d) type and quantity of work performed;
- (e) the amount payable with GST and MRST shown as separate amounts; and
- (f) the Contractor's GST registration number.

D11.3 The City will bear no responsibility for delays in approval of invoices which are improperly submitted.

D11.4 Bids Submissions must be submitted to the address in B7.7.

### **D12. PAYMENT**

D12.1 Further to C11, the City may at its option pay the Contractor by direct deposit to the Contractor's banking institution.

## **WARRANTY**

### **D13. WARRANTY**

D13.1 Warranty is as stated in C12.

## **PART E - SPECIFICATIONS**

### **GENERAL**

#### **E1. APPLICABLE SPECIFICATIONS**

E1.1 These Specifications shall apply to the Work.

#### **E2. SERVICES**

E2.1 The Contractor shall survey a random sample of people currently registered with Handi-Transit, a parallel transportation service provided for those unable to use Winnipeg Transit's regular service, by telephone, following proper survey methodology.

E2.2 The total sample size shall be 800 respondents.

E2.3 The ratio of ambulatory Handi-Transit clients to non-ambulatory Handi-Transit clients shall be 1:1.

E2.4 Winnipeg Transit shall provide to the Contractor approximately 6,900 telephone numbers, representing approximately 7,300 registered Handi-Transit clients, from which the Contractor can draw the sample. Approximately 76% of the clients are ambulatory and 24% are non-ambulatory.

E2.5 The Contractor shall supply Winnipeg Transit with the telephone numbers of respondents unable to complete the questionnaire via telephone because of communication difficulties. Winnipeg Transit will deliver a printed copy of the questionnaire to these respondents and have the completed questionnaires returned directly to Winnipeg Transit. Respondents who have requested and completed a printed questionnaire shall not be included in the total sample size.

E2.6 The survey instrument shall be in accordance with the attached questionnaire.

E2.7 The Contractor shall review and field test the questionnaire prior to conducting the Survey.

E2.8 The Contractor shall code, keypunch and verify the survey responses.

#### **E3. DATA AND REPORTS**

E3.1 The Contractor shall provide Winnipeg Transit with:

- (a) an electronic file containing the data in Microsoft Excel format;
- (b) an electronic file containing verbatim responses received to open-ended questions; and
- (c) a summary of categorized comments received to open-ended questions.

#### **E4. QUESTIONNAIRE**

E4.1 Handi-Transit Customer Survey Questionnaire                      pages 1-12



# Handi-Transit Customer Survey Wave 4 - Fall 2014

(ANYTHING IN UPPER CASE IS NOT TO BE READ TO RESPONDENT)

## MOBILITY

**RECORD MOBILITY STATUS - DO NOT ASK**

Ambulatory ..... A  
Non-ambulatory ..... W

## INTRO1

**Good evening/day, is this (telephone number)?**

Yes --> CONTINUE WITH ENROLLMENT ..... 1      => INTRO2  
No --> DISCONTINUE ENROLLMENT ..... 2      => TERMINATE

## INTRO2

**Hello, my name is \_\_\_\_\_ and I'm calling from \_\_\_\_\_ on behalf of Handi-Transit.**

CONTINUE ..... 1      => SCREENER1  
No registrants living here ..... 2      => SCREENER2  
Refusal ..... 9      => TERMINATE

## SCREENER1

**I need to speak to a person in your home who is currently registered with Handi-Transit. Would that be you?**

Yes --> CONTINUE WITH ENROLLMENT ..... 1      => SCREENER3  
No - Registrant coming to phone ..... 2      => INTRO3  
Respondent available for callback --> ARRANGE CALLBACK ..... 3  
Respondent not available for callback --> TERMINATE ..... 4      => TERMINATE  
No Handi-Transit registrant living at residence ..... 5      => SCREENER2  
Wrong number ..... 6      => TERMINATE  
Refused participation ..... 7      => TERMINATE

## SCREENER2

**It was our understanding that this was a contact number for a Handi-Transit registrant. Did a Handi-Transit registrant recently live at this residence?**

Yes ..... 1      => NEWNUMBER  
No ..... 9      => TERMINATE

## NEWWNUMBER

**Do you have a number where they can be reached?**

Yes - NEW NUMBER GIVEN ..... 1      => TERMINATE  
No - NO NEW NUMBER GIVEN ..... 2      => TERMINATE  
No Response ..... 9      => TERMINATE

## INTRO3

**Hello, my name is \_\_\_\_\_ and I'm calling from \_\_\_\_\_ on behalf of Handi-Transit.**

CONTINUE ..... 1      => SCREENER3  
Refusal ..... 9      => TERMINATE

**TERMINATE**

Thank you for your time. Good-bye.

TERMINATE - CODE AS NOT CONTACTED..... 1

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**SCREENER3**

Today we are talking with people about Handi-Transit service. Your participation in this survey is voluntary and you may choose not to answer any particular question I ask. All questions refer to Handi-Transit service since our last survey in May, 2008. When responding to the questions, only consider the service levels you have experienced in the past 3 years even if you have used Handi-Transit service longer than that.

First of all, is any member of your household, including yourself, employed by Winnipeg Transit?

- No --> CONTINUE..... 1           => Q1
  - Yes --> DISQUALIFY ..... 2       => DISQUALIFY
  - Don't know / No Response --> DISQUALIFY ..... 9       => DISQUALIFY
- 

**DISQUALIFY**

I'm sorry, but that disqualifies you from our study, but thank you for your time.

TERMINATE - CODE AS NON-QUALIFIED..... 1

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**Q1**

How many rides do you take with Handi-Transit in a typical month? Count going to and from your destination as a single ride.

- Never ..... 1
  - Less than once a month..... 2
  - 1 or 2 rides a month ..... 3
  - 3 to 5 rides a month ..... 4
  - 6 to 10 rides a month ..... 5
  - More than 10 rides a month ..... 6
  - Don't know / No response..... 9
- 

**Q2**

How would you rate the process of applying for Handi-Transit services?

Are you... (READ RESPONSES 1 – 4)

- Very satisfied..... 1
  - Somewhat satisfied ..... 2
  - Somewhat dissatisfied ..... 3
  - Very dissatisfied ..... 4
  - Don't remember..... 5
  - Don't know / No response..... 9
-



**Q3**

**Where would you find it most convenient to get information about Handi-Transit?**  
(ACCEPT ONLY ONE RESPONSE)

Brochure / Newsletter .....	1
Phone book .....	2
Internet.....	3
Doctor / Social worker / Hospital staff .....	4
Word of mouth.....	5
Newspaper / Media.....	6
CNIB / MS Society / Society for Manitobans with Disabilities / other service organizations .....	7
Winnipeg Transit / Bus Depot .....	8
Handi-Transit drivers.....	9
Handi-Transit card.....	10
Mail.....	11
Other (SPECIFY) .....	97 O
Don't know / No response.....	99

**Q4**

**Do you have access to the Internet at home?**

Yes.....	1
No .....	2
Don't know / No response.....	9

**Q5**

**Do you carry a cell phone with you when you travel in a Handi-Transit vehicle?**

Yes.....	1
No .....	2
Don't know / No response.....	9

**Q6**

**On average, how long do you have to wait on the telephone to speak to a customer service representative?**

Less than 3 minutes .....	1
3 to 5 minutes .....	2
6 to 10 minutes .....	3
More than 10 minutes .....	4
I do not know because someone else calls to book my ride.....	5
Don't know / No response.....	9

**Q7**

**In the last year, how many times have you waited on the phone so long that you hung up and tried to call the Handi-Transit customer service representative again later?**

_____ times	
Don't know / No response.....	99

## Q8

**Overall, how satisfied are you with the customer service representatives taking your call when booking a ride with Handi-Transit?**

**Are you...** (READ RESPONSES 1 - 4)

Very satisfied.....	1	=> PREFACE2
Somewhat satisfied.....	2	=> PREFACE2
Somewhat dissatisfied.....	3	=> Q9
Very dissatisfied.....	4	=> Q9
Don't know / No response.....	9	=> PREFACE2

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## Q9

**Why are you dissatisfied with the customer service representatives?**

(ACCEPT ONLY ONE RESPONSE)

Wait times on phone are lengthy.....	1	
They are impolite / rude / don't listen.....	2	
Could not provide the correct information.....	3	
Penalized me for canceling.....	4	
Ask invasive questions.....	5	
Service limitations (general).....	6	
Scheduled two vehicles for same household.....	7	
Cancelled my registration.....	8	
Other (SPECIFY).....	97	O
Don't know / No response.....	99	

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## PREFACE1

**Confirmation calls are required to let the customer know if Handi-Transit is able to provide the trip and to give the passenger an accurate pick-up time.**

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## Q10

**Do you use the automated trip confirmation service or do you speak to one of our representatives to confirm your ride?**

Automated service.....	1
Speak to a representative.....	2
Use both services.....	3
Don't know / No response.....	9

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## Q11

**Overall, how satisfied are you with the process of confirming rides with Handi-Transit?**

**Are you...** (READ RESPONSES 1 - 4)

Very satisfied.....	1
Somewhat satisfied.....	2
Somewhat dissatisfied.....	3
Very dissatisfied.....	4
Don't know / No response.....	9

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## Q12

**Do you have an answering machine or voice-mail at your home?**

Yes.....	1
No.....	2
Don't know / No response.....	9

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**Q13**

**If the option were available, would you want an automated phone call to your home or home voice-mail to confirm your trip?**

- Yes..... 1
- No ..... 2
- Don't know / No response..... 9

**Q14**

**If the option were available, would you want an e-mail message sent to you to confirm your trip?**

- Yes..... 1
- No ..... 2
- Don't know / No response..... 9

**Q15**

**In the last year, how many times has Handi-Transit been unable to provide your trip or one way of a return trip?**

- \_\_\_\_\_ times
- Don't know / No response..... 99

**Q16**

**Have you ever called Handi-Transit to cancel a ride?**

- Yes..... 1
- No ..... 2      => Q22
- Don't know / No response..... 9

**Q17**

**How often do you cancel your Handi-Transit rides?**

(READ RESPONSES 1 - 4)

- Often ..... 1
- Occasionally ..... 2
- Seldom..... 3
- Never ..... 4      => Q22
- Don't know / No response..... 9

**Q18**

**Why do you cancel your Handi-Transit rides?**

(DO NOT READ RESPONSES — ACCEPT ONLY ONE RESPONSE)

- I changed my plans ..... 1
- I was sick / in hospital / health issues ..... 2
- Schedule changes..... 3
- I was not satisfied with the pick-up times assigned ..... 4
- I was able to make alternate arrangements ..... 5
- Weather issues ..... 6
- Wait for pickup was too long / Never showed up..... 7
- I book more trips than I plan to use to make sure I get a ride..... 8
- Only provided one-way trip..... 9
- Sent the wrong vehicle..... 10
- Circumstances (non-specific) ..... 11
- Other (SPECIFY) ..... 97 O
- Don't know / No response..... 99

**Q19**

**Do you use the automated trip cancellation service or do you speak to one of our representatives to cancel your ride?**

- Automated service ..... 1
- Speak to a representative ..... 2
- Use both services ..... 3
- Don't know / No response..... 9

**Q20**

**Overall, how satisfied are you with the process of cancelling rides with Handi-Transit?**

**Are you... (READ RESPONSES 1 - 4)**

- Very satisfied ..... 1
- Somewhat satisfied ..... 2
- Somewhat dissatisfied ..... 3
- Very dissatisfied ..... 4
- Don't know / No response..... 9

**Q21**

**If the option were available, would you use an automated phone system to book Handi-Transit trips to your most frequent destinations?**

- Yes..... 1
- No ..... 2
- Don't know / No response..... 9

**Q22**

**If the option were available, would you prefer to pay your fares by automatic withdrawal from an account set up with Handi-Transit instead of carrying cash or tickets and paying the driver?**

- Yes ..... 1
- No ..... 2
- Don't know / No response..... 9

**Q23**

**Are you aware of Handi-Transit's 'No Show' policy regarding pick-ups?**

- Yes..... 1
- No ..... 2
- Don't know / No response..... 9

**PREFACE2**

**A trip is considered a 'No Show' if a ride is booked and confirmed, but the rider either refuses the ride or isn't at the pick-up point up to 5 minutes after the pick-up time.**

**Q24**

**Are you aware that fines may be imposed if a rider is a 'No Show' without valid reasons?**

- Yes..... 1
- No ..... 2
- Don't know / No response..... 9

**Q25**

**How often does the Handi-Transit vehicle pick you up and drop you off on time?**

**Is it...** (READ RESPONSES 1 - 4)

- Always..... 1
- Sometimes ..... 2
- Rarely ..... 3
- Never ..... 4
- Don't know / No response..... 9

**Q26**

**In the last year, how many times has Handi-Transit failed to pick you up for a scheduled trip?**

\_\_\_\_\_ times

- Don't know / No response..... 99

**Q27**

**Generally speaking, are Handi-Transit drivers...** (READ RESPONSES 1 - 4)

- Always courteous ..... 1
- Usually courteous ..... 2
- Rarely courteous ..... 3
- Never courteous ..... 4
- Don't know / No response..... 9

**Q28**

**Generally speaking, when picking you up and dropping you off, are Handi-Transit drivers...**

(READ RESPONSES 1 - 4)

- Always helpful..... 1
- Usually helpful ..... 2
- Rarely helpful ..... 3
- Never helpful ..... 4
- Don't know / No response..... 9

**Q29**

**How often does your Handi-Transit driver assist you to and from the Handi-Transit vehicle?**

**Is it...** (READ RESPONSES 1 - 4)

- Always..... 1
- Sometimes ..... 2
- Seldom..... 3
- Never ..... 4
- Not applicable..... 5
- Don't know / No response..... 9

**Q30**

**How often does your Handi-Transit driver assist you into and out of the Handi-Transit vehicle?**

**Is it...** (READ RESPONSES 1 - 4)

- Always..... 1
- Sometimes ..... 2
- Seldom..... 3
- Never ..... 4
- Not applicable..... 5
- Don't know / No response..... 9

**Q31**

**How often does your Handi-Transit driver ask if you need assistance with your seatbelt?**

**Is it...** (READ RESPONSES 1 - 4)

Always.....	1
Sometimes .....	2
Seldom.....	3
Never .....	4
Not applicable.....	5
Don't know / No response.....	9

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**Q32**

**How often does your Handi-Transit driver ensure that mobility aids, such as wheelchairs, scooters or walkers, are secured properly?**

**Is it...** (READ RESPONSES 1 - 4)

Always.....	1
Sometimes .....	2
Seldom.....	3
Never .....	4
Not applicable.....	5
Don't know / No response.....	9

---

**Q33**

**How often does your Handi-Transit driver ensure that carry-on items are secure?**

**Is it...** (READ RESPONSES 1 - 4)

Always.....	1
Sometimes .....	2
Seldom.....	3
Never .....	4
Not applicable.....	5
Don't know / No response.....	9

---

**Q34**

**Overall, how safe do you feel when riding in Handi-Transit vehicles?**

**Do you feel...** (READ RESPONSES 1 - 4)

Extremely safe.....	1
Generally safe.....	2
Not very safe.....	3
Not at all safe.....	4
Don't know / No response.....	9

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**Q35**

**In the last year, have you ever felt unsafe during a ride in a Handi-Transit vehicle?**

Yes.....	1	
No .....	2	=> Q37
Don't know / No response.....	9	

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**Q36**

**What made you feel unsafe?**

(ACCEPT ONLY ONE RESPONSE)

Way the vehicle was driven.....	1
Driver's appearance and/or behavior.....	2
Driver didn't secure the passenger properly.....	3
Driver used cell phone while driving.....	4
Poor condition of vehicle.....	5
Was involved / almost in an accident .....	6
Uncomfortable in the vehicle.....	7
Driver got lost / unfamiliar with area.....	8
Weather / road conditions .....	9
Another passenger .....	10
Other drivers, traffic conditions.....	11
Poor communication / confusion with what driver was doing.....	12
Driver left the vehicle unsecured.....	13
Being alone with the driver.....	14
Late for pickup / Thought I was forgotten .....	15
Driver impaired.....	16
Other (SPECIFY) .....	97 O
Don't know / No response.....	99

**Q37**

**Have you ever filed a commendation or complaint with Handi-Transit?**

Yes.....	1	
No .....	2	=> Q39
Don't know / No response.....	9	

**Q38**

**How satisfied were you with the way your commendation or complaint was handled?**

**Were you...** (READ RESPONSES 1 - 4)

Very satisfied.....	1
Somewhat satisfied.....	2
Somewhat dissatisfied .....	3
Very dissatisfied .....	4
Don't know / No response.....	9

**Q39**

**Overall, how would you rate the level of service you receive from Handi-Transit?**

**Are you...** (READ RESPONSES 1 - 4)

Very satisfied.....	1
Somewhat satisfied.....	2
Somewhat dissatisfied .....	3
Very dissatisfied .....	4
Don't know / No response.....	9

**Q40**

**Are you aware that Winnipeg Transit operates low-floor buses on much of its regular service?**

Yes.....	1
No .....	2
Don't know / No response.....	9

**Q41**

**Since you became eligible for Handi-Transit, have you ever taken a low-floor bus Winnipeg?**

- Yes..... 1
- No ..... 2
- Don't know / No response..... 9

**Q42A, Q42B & Q42C**

**For you, what are the barriers to using low-floor buses?**

(ACCEPT MAXIMUM OF THREE RESPONSES)

- Health reasons (physically unable to use them)..... 1
- Too far / distance to get to bus stop ..... 2
- Weather / Conditions at bus stops..... 3
- Difficult to get to the bus stop / Poor sidewalks / Streets are too busy ..... 4
- Securing of my wheelchair or scooter ..... 5
- No room for walker/wheelchair/scooter/cane ..... 6
- Low-floor buses don't service all routes / Routes aren't convenient..... 7
- Other passengers aren't courteous / make me feel uncomfortable..... 8
- Interior bus conditions / Crowding / Blocked aisles ..... 9
- Bus drivers less knowledgeable than Handi-Transit drivers regarding safety and sensitivity to my situation ..... 10
- Bus drivers won't assist when needed..... 11
- Have to ask for bus to be lowered / Isn't lowered enough / Too hard to get on .... 12
- Don't know or hard to comprehend schedules and routes ..... 13
- Need assistance/attendant ..... 14
- Uncomfortable with riding bus / Nervous / Not safe ..... 15
- Don't know enough about the system ..... 16
- Not enough buses available ..... 17
- The way the bus is driven / Too fast / Too bumpy ..... 18
- Need photo pass..... 19
- Taxi/Handi-Transit is easier/more convenient / Door-to-door service ..... 20
- Drive myself / Get driven ..... 21
- Don't use the bus / Never used the bus / No need to use bus ..... 22
- No barriers ..... 96
- Other (SPECIFY) ..... 97 O
- Don't know / No response..... 99

**Q43**

**If you were able to participate in a program that teaches you about routes, reading schedules, and getting on and off the bus, would you be willing to take the low-floor regular transit buses more often?**

- Yes..... 1
- No ..... 2
- Don't know / No response..... 9

**Q44**

**Would you ride on the low-floor regular transit buses more often if you had a support person ride with you while you practice taking the bus to destinations you frequently travel to?**

- Yes..... 1
- No ..... 2 => Q46
- Don't know / No response..... 9



### Q45

**How long would you want the support person to ride with you to be comfortable taking the low-floor regular transit buses on your own more often?**

(READ RESPONSES 1 – 4 AND THEN ASK “OR SOME OTHER PERIOD OF TIME?”)

1/2 day of training.....	1
One day of training.....	2
Two days of training.....	3
Always.....	4
1 1/2 days of training.....	5
More than 2 days of training.....	6
A few trips.....	7
As long as I need it.....	8
Depends on the person / location.....	9
Don't need.....	10
Other (SPECIFY).....	97 O
Don't know / No response.....	99

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### Q46A & Q46B

**What other comments would you like to make about Handi-Transit or low-floor bus services in Winnipeg?**

(ACCEPT MAXIMUM OF TWO RESPONSES)

Great / terrific service.....	1
Handi-Transit wait times / Inaccurate pick-up times.....	2
Lack of return trips.....	3
Happy that service is available.....	4
Issues with driver's appearance / behavior / lack of training.....	5
Low-floor buses aren't accessible.....	6
Routes with low-floor buses aren't available.....	7
Need more Handi-Transit vehicles.....	8
Would use more often if fewer restrictions / more flexible / greater access.....	9
Poor service / Don't like service / Service is getting worse.....	10
Problems with application / regulations.....	11
Need better vehicles / Maintain vehicles.....	12
Need more information on low-floor buses.....	13
Don't like automated system / Booking system difficult.....	14
Need to coordinate riding times.....	15
Tickets / Cost / Not able to use regular transit tickets.....	16
Safety issues.....	17
Appreciate door-to-door service.....	18
Need an attendant / assistance.....	19
Bus passengers not courteous to handicapped / Not always aware of needs.....	20
Issues with the driver's driving abilities.....	21
Problems with system in winter time.....	22
Issues with telephone reps.....	23
Lack of coordination between drivers and head office.....	24
Would use low-floor buses if they were free.....	25
More access to information.....	26
Don't like when people abuse service / make frivolous trips.....	27
Other (SPECIFY).....	97 O
No comments.....	98
Don't know / No response.....	99

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**GENDER**

*RECORD GENDER - DO NOT ASK*

Female .....	1
Male.....	2
Undetermined .....	3

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**CLOSING**

**That's all the questions I have for you now. Thank you for your time.**