



May 6, 2026

Dear Sir/Madam:

Enclosed please find Addendum No. 01 to SEPTA's Request for Proposal #26-00025-AKQC, *Customer Service Social Skills Training for Surface and Rail Transportation and Station Personnel*.

Please be advised that the proposal due date and time of **Thursday, May 14, 2026, at 4:00 PM (ET)** remain unchanged. Proposals must be hand delivered as specified in the solicitation. This addendum provides responses to questions submitted during the question period, along with any applicable supporting attachments referenced therein.

Addendum No. 1 must be acknowledged by signing the attached Acknowledgement Sheet and including that sheet as part of your technical proposal.

Any inquiries regarding this bid must be directed to Tinamarie Rintye, Contract Administrator at (215) 580-6075.

Thank you for your interest in the Authority.

Sincerely,

A handwritten signature in black ink, appearing to read 'Tinamarie Rintye', written over a light blue horizontal line.

Tinamarie Rintye
Contract Administrator
Procurement & Supply Chain Management

TR Enclosure



Addendum 01
Date: May 6, 2026
Page 1 of 25

Request for Proposal #26-00025-AKQC
Customer Service Social Skills Training for Surface and Rail Transportation and Station Personnel
Addendum No. 01

To All Proposers:

The following constitutes Addendum No. 01 to SEPTA's Request for Proposal #26-00025-AKQC, Customer Service Social Skills Training for Surface and Rail Transportation and Station Personnel. Addendum No. 01 must be acknowledged by inserting the date on the Addenda Response form. Failure to do so may render a bidder's proposal as non-responsive.

A. General

1. The proposal submittal date and time remain unchanged and are scheduled for Thursday, May 14, 2026, at 4:00 PM (ET).
2. Questions 1—41, 50—53, 55—73, 75-107, and 109 are addressed herein. Responses to the remaining questions will be provided in a future addendum.
3. Attachment A is on page 20 of this Addendum.
4. Attachment B is on page 21 of this Addendum.
5. Attachment C is on page 22 of this Addendum.

B. Specifications

1. Not applicable

C. Drawings

1. Not applicable



Addendum 01
Date: May 6, 2026
Page 2 of 25

Request for Proposal #26-00025-AKQC
Customer Service Social Skills Training for Surface and Rail Transportation and Station Personnel
Addendum No. 01

Questions and Answers to 1—41, 50—53, 55—73, 75-107, and 109

Item #	Question	Answers
1	The RFP indicates training may occur throughout SEPTA's service area. Is there a primary training facility where most sessions are conducted? Additionally, how frequently are sessions expected at secondary locations?	Currently, the primary training location is 1234 Market St. Previously, classes were conducted at the Southern Depot training facility. In the future, classes will be conducted at SEPTA's new Training Center, SEPTA University, located at the 13th and Market St. and is currently under renovation. Training locations will be at the discretion of SEPTA
2	The scope references feedback and lessons learned from prior classes. Will SEPTA provide summaries of prior evaluations, participant feedback, or performance data? Additionally, how does SEPTA envision the role of prior program insights in shaping the future training approach?	The prior program vendor is not able to share their evaluations, participant feedback, or performance data as this is proprietary information.
3	Do anticipated annual training volumes represent steady-state delivery, or should proposers expect variability based on hiring levels or operational needs?	Variability based on hiring levels.
4	The scope references approximately 27 participants per class. Are there minimum enrollment thresholds required to conduct a session? Additionally, what is the typical maximum class size?	Enrollment thresholds are not established as courses are assigned.
5	Does SEPTA have an existing evaluation framework, or is the consultant expected to design the measurement methodology? Will baseline data be provided?	SEPTA does not currently have an established evaluation framework for this effort. The consultant will be responsible for designing the measurement methodology, including defining metrics and success criteria. Baseline data will not be provided; the consultant is expected to identify, collect, and establish baseline measures as part of their scope of work.



Item #	Question	Answers
6	Is training expected to be fully in person, or will any portion be hybrid or virtual?	Fully in-person
7	Will the consultant be responsible for printing and delivering training materials, or will SEPTA provide centralized support?	Consultant is responsible
8	What is the anticipated Notice to Proceed date, and how much lead time will be provided between award and initial delivery?	Notice to Proceed is anticipated in August, pending approval at the July Board meeting. Training classes are expected to begin approximately one month following contract award. If the July Board meeting is missed, the project would instead be presented at the September Board meeting, as there is no Board meeting in August.
9	Should hourly rates be inclusive of all costs, or should certain elements be itemized separately?	Inclusive of costs
10	The RFP references up to 100 hours of development per course. Does this apply per course type or across the full program scope?	Per course
11	What types of updates would be considered billable course modifications versus included in the base scope?	Examples would be additional curriculum development, participant manual modifications, etc.
12	Can SEPTA confirm the intended contract structure?	The contract will be structured as a professional services agreement between SEPTA and the selected contractor. It will be established on a not-to-exceed total contract price, based on the proposer's submitted pricing. Payments will be made periodically (typically monthly) for work that has been completed, invoiced and approved. Cost-plus-percentage-of-cost contract types are not permitted. For complete details, vendors should refer to the Contract Requirements and Price Proposal sections of the RFP.
13	Should the 20-minute demonstration video be included in the Technical Proposal package, and are there specific technical requirements?	Please include an .MP4 file on the flash drive or USB drive submitted with the electronic copy of the proposal.



Addendum 01
 Date: May 6, 2026
 Page 4 of 25

Item #	Question	Answers
14	Can SEPTA clarify the process for approval of substitute instructors if needed?	SEPTA clarifies that, in accordance with Part II – Contract Requirements, Section 6 (Personnel to Be Used in Providing Services), any substitute instructors must be submitted to SEPTA for review and receive prior written approval before performing any work. The Contractor/Consultant may only add or replace personnel with SEPTA’s written consent in each instance
15	The RFP states that the new contract will incorporate "feedback and lessons learned from the previous classes developed and performed under the previous/existing contract." Will SEPTA share any available summary of that feedback, participant evaluation data, or lessons learned with proposers prior to submission, so that proposals can reflect those insights?	Some case studies can be provided.
16	Can SEPTA confirm whether the selected vendor will be expected to develop new curriculum from scratch, adapt and refresh existing curriculum, or both? Will SEPTA provide the current course materials to proposers or to the selected vendor at the start of the engagement?	We cannot provide the current vendor's proprietary materials
17	The scope references two distinct courses: the Customer Service Social Skills Training course (audience lines A–D) and the Customer Service and Motivational Techniques, Communication and Conflict Management Skills Training course for Operations Managers (audience line E). Are these two entirely separate curricula requiring separate course development fees, or is one derived from the other?	Separate courses
18	The pricing form references "Course Development Qty=1/audience" with a note that course development cost shall be the price to develop each course, and that the consultant shall assume no more than 100 hours of course development time per course. Does the 100-hour cap apply per audience line (i.e., up to 5 separate course development efforts), or per the two distinct courses described in the scope?	Per course
19	The scope states the new program will include feedback from previous classes. Will SEPTA provide the selected vendor with access to current facilitator guides, participant workbooks, and evaluation instruments from the existing program as a starting point?	The prior program vendor is not able to share their evaluations, participant feedback, or performance data as this is proprietary information.
20	The anticipated annual schedule lists up to 63 classes per year, not to exceed 300 days. Can SEPTA confirm the typical number of instructors it expects to be on-site simultaneously? For example, are multiple classes ever scheduled to run in parallel on the same day at different locations?	Correction, 68. Yes multiple classes can be run in parallel



Item #	Question	Answers
21	Are all training sessions delivered at a single SEPTA facility, or across multiple locations in the Philadelphia region? If multiple locations, can SEPTA provide a list of the primary training sites?	Primary location is currently 1234 Market St. Additional locations will be 13th & Market St. (Wanamaker Bldg.)
22	The RFP requires a recorded 20-minute demonstration conducted by instructors who will actually deliver training for SEPTA if awarded. May the demonstration video feature more than one instructor, or should it feature a single instructor for the full 20 minutes?	Any Instructors utilized for the demo must be Instructors that will be conducting SEPTA trainings if awarded
23	Are there any technical specifications for the demonstration video (file format, resolution, maximum file size, platform for submission)? Should it be submitted on the flash drive along with the written proposal?	Please see response to Q13.
24	The pricing form requests hourly rates for each audience line for Years 1 through 5, plus a separate course development cost. Should the hourly rate cover all costs of delivery (facilitator time, materials, supplies), with travel and lodging billed separately at federal per diem rates as noted on the form? Or should travel and lodging be included in the hourly rate?	Included in the rate
25	The contract is described as an "as-required contract" and SEPTA is not obligated to expend any specific amount. Is there a minimum guaranteed number of class days per year, or is all volume entirely at SEPTA's discretion?	At SEPTA's discretion
26	Can SEPTA share the approximate total contract value or annual spend range from the current or most recent contract for this scope of services, to help proposers calibrate pricing appropriately?	No
27	The contract term is 1,825 calendar days (5 years). Are hourly rates fixed for the full five-year term, or does SEPTA anticipate annual escalation provisions?	Hourly rates are to be established in accordance with Schedule A (Price Proposal) for the full five-year term. While pricing is requested on a yearly basis within Schedule A for evaluation purposes, the contract does not include provisions for automatic annual escalation.



Item #	Question	Answers
28	Can SEPTA confirm the name of the current contractor providing these services under the existing contract? Understanding who has been delivering this program will help proposers better contextualize the "lessons learned" referenced in the scope and position their approach appropriately.	Please submit a Public Records request to SEPTA's Office of Open Records using the Standard RTKL Request Form. The form must include your name, mailing address, and a clear description of the records requested. Completed forms can be sent to openrecordsofficer@septa.org or mailed to: Open Records Officer c/o Office of General Counsel 1234 Market Street, 5th Floor Philadelphia, PA 19107
29	The RFP requires hand delivery of one hard copy Technical Proposal, one hard copy Price Proposal, and one flash drive by May 14, 2026 at 4:00 PM ET. Is there a specific room or floor at 1234 Market Street where proposals must be delivered, or should they be delivered to the general reception desk at SEPTA's offices?	Proposals should be hand delivered to SEPTA Headquarters at 1234 Market Street and directed to Tinamarie Rintye on the 11th floor. Delivery to the building's reception or security desk is acceptable, as materials will be routed accordingly.
30	Does SEPTA anticipate conducting oral presentations or interviews for this procurement, and if so, what is the likely timing relative to the May 14 submission deadline?	SEPTA may, at the discretion of the technical evaluation committee, conduct oral presentations or interviews if deemed necessary to support the evaluation of submitted proposals. Any such interviews would take place after the proposal submission deadline and would be used solely to seek clarification of proposal content.
31	Is there a pre-proposal meeting or site visit planned for this RFP?	The pre-proposal meeting was conducted on Wednesday, April 15, 2026.
32	Has this work previously been performed by another consultant or contractor? If so, can SEPTA explain why it has chosen to reissue the RFP rather than continue with the previous consultant or contractor?	Yes. Contract has concluded
33	On page 47 there is a reference to operations divisions mangers and in the cost form there is a reference to operations managers. For shared meaning, which managers within operations would be part of this training? A) all divisional managers within operations or B) all managers within the operations divisions?	Various Managers in Operations at SEPTA's discretion



Addendum 01
Date: May 6, 2026
Page 7 of 25

Item #	Question	Answers
34	The RFP states that proposals must be “hand delivered.” Would SEPTA consider proposals submitted via courier or overnight delivery service (e.g., FedEx, UPS, or similar), provided they are received by the stated deadline? If the answer is no, what is the rationale for it being hand-delivered?	SEPTA will accept proposals delivered via courier or overnight delivery services (e.g., FedEx, UPS, or similar), provided they are received at the designated location by the stated deadline. For purposes of this requirement, such deliveries are considered acceptable forms of “hand delivery.” Proposers are responsible for ensuring timely receipt, as late submissions cannot be accepted.
35	Can SEPTA share a copy of the latest Org Chart?	The Training Department Org Chart or Authority-wide?
36	For the trainings listed as 3, 4, or 5-day sessions, does SEPTA anticipate that the training days will occur consecutively, i.e., Monday-Thursday for a 4 day training for the same cohort?	Consecutively
37	Attachment 3/Cost form appears to provide limited space for certain project activities that may be necessary to successfully perform the scope of work? May proposers modify or supplement the Price Proposal form to include additional line items?	Form modified and is included with the addendum 01 as attachment A
38	The draft contract appears to require that any rescheduling occur with only five (5) days’ notice. Due to the nature of consulting work, five days is often insufficient time to secure replacement business for reserved training dates. Would SEPTA consider either extending the required cancellation/rescheduling notice period or providing a partial payment for classes cancelled or rescheduled within five (5) days of the scheduled training date?	No, the requirements related to cancellations will remain as is
39	Part II Attachment 8 – Project Progress and Performance Evaluation Form – do contractors need to do anything with this form, or is it just for reference?	The document will be completed by SEPTA for the awarded contractor.
40	One attendee asked for clarification regarding the Price Proposal Chart, specifically whether sufficient space is available to include text information in the first column labeled “Course Development.” The attendee noted that the text does fit within the current chart and asked whether the existing format may continue to be used if SEPTA does not issue a modified chart.	N/A



Item #	Question	Answers
41	Will SEPTA policies and procedures for customer service, such as handling complaints and responding to and/or de-escalating violence be available to the vendors to integrate into the curriculum and use as classroom materials?	Employee guidelines can be shared to incorporate into curriculum once the vendor has been chosen.
50	Section 23.B.1. should have the following language removed: “and any other documents which SEPTA may require, such as copies of policies or endorsements”	We can accept deletion of only "policies or", but the rest of the sentence must remain included.
51	Section 23.D.1. should be deleted	We can accept deletion.
52	Section 23.G. should have the following language removed: “is limited to \$50,000,000 or less, subject to SEPTA’s approval. Every self-insured retention”	Reject deletion. SEPTA routinely approves deductibles or SIRs greater than \$50,000, but those deductibles/SIRs must be disclosed to SEPTA by line of coverage to evaluate our confidence with any vendor's ability to support large deductible/SIRs.
53	Section 23.H.1 should be modified as follows: Comprehensive Commercial General Liability Insurance (“CGL”) for Bodily Injury and Property Damage to others. Covering CGL on an “occurrence” basis, including products and completed operations, property damage, bodily injury and personal & advertising injury with limits no less than \$1,000,000.00 combined limit per occurrence and \$2,000,000.00 aggregate.	I only identify the addition of "Commercial", which is acceptable.
55	Under section 4 in the contract portion of the RFP (p. 21), it states, "Contractor/Consultant shall perform all the services required under the Agreement within a total of 1,825 calendar days (5 years) from the effective date stated in SEPTA's written Notice to Proceed (“NTP”)". Is this a five year contract? If not, what is the length of the contract?	Yes, 5-year contract



Item #	Question	Answers
56	<p>The RFP states:</p> <p>"It is anticipated that the Customer Service Social Skills Training course will be offered to SEPTA's newly-hired and veteran front-facing employees approximately sixty-three (63) times over a one(1) year period.</p> <p>The classes will be either a five (5) day class for the newly hired employee and a four (4) day class for the veteran employee. The classes will consist of approximately twenty-seven (27) students. The anticipated annual schedule for the classes is as follows:</p> <ol style="list-style-type: none"> 1. New Bus Operators - 16 five-day classes 2. New Asst. Conductors - 16 five-day classes 3. Veteran Bus Operators/Asst. Conductors/Cond. - 16 four-day classes 4. Veteran Cashiers/Maintenance Custodians - 15 four-day classes 5. Operations Managers - 5 three-day classes <p>It is anticipated that the Customer Service and Motivational Techniques, Communication, and Conflict Management Skills Training course for Operations Managers will be offered five (5) times over any one (1) year period. The classes will be three (3) days."</p> <p>Are all of these course outlines correct? Just to confirm, this would mean there would be multiple weeks throughout the year where more than one course would be running?</p>	<p>Yes, per SOW</p>
57	<p>SEPTA's Evaluation Criteria and the required Form of Proposal items do not fully align. In order to organize our submission in the manner that will be easiest for evaluators to review and score, would SEPTA please clarify whether proposers should organize the Technical Proposal according to the "Form of Proposal" items, according to the Evaluation Criteria categories, or another preferred format. For example, the organization chart and resumes (Form of Proposal) align with Qualifications and Experience (Evaluation Criteria), while other areas are less clear.</p>	<p>Proposers should organize the Technical Proposal in accordance with the Evaluation Criteria categories to facilitate review and scoring. However, the submission must remain fully compliant with all requirements outlined in the Form of Proposal section, and all required items must be clearly addressed within the proposal, regardless of where they appear.</p>



Item #	Question	Answers
58	With regard to Evaluation Criterion A, "Project Approach and Deliverables" appears to reference only the recorded 20-minute demonstration. In a typical proposal structure, items such as the proposer's interpretation of the project objectives, description of services, approach to delivering the work, and anticipated deliverables would also normally be included within a "Project Approach" section. Should proposers include those narrative elements under Evaluation Criterion D, "Project Plan," or does SEPTA intend for Criterion A to encompass both the recorded demonstration and the proposer's written approach/understanding of the project?	Criterion A - Project Approach and Deliverable should include required items re: the demonstration per the SOW. Criterion D - should include details pertinent to the Project Plan
59	One attendee asked about the Price Proposal Chart. They weren't sure if they could fit text information within the first column labeled "Course Development." We are working on the price proposal and are able to fit all of the text. If SEPTA chooses to modify the existing chart, may we still use the one presently shown?	Chart modified
60	To confirm, is ESMS (section 48 part 2) required to be filled out pre-award?	The awarded contractor will be responsible for completing this task.
61	To confirm, are Attachments 7 and 8 to be filled out post-award?	Attachment 7 is required with the proposal submission. Attachment 8 will be completed by the awarded contractor after contract award.
62	To confirm, should Attachment 9 be filled out when submitting the proposal?	Yes, Attachment 9 is required to be completed and submitted as part of the proposal. Immigration compliance is required for all procurements.
63	Is there a more legible Solicitation Stat Form file, page 56 to use? Some text is hard to read.	See attachment B in the addendum 001
64	Is the Solicitation Stat Form, page 56, to be filled out pre-award?	Yes. The Solicitation Stat Form (page 56) must be completed and submitted with the proposal.
65	Do we need to get any forms notarized? See page 44 of RFP indicating (Seal) or is this form post award?	No forms are required to be notarized as part of the proposal submission. The form referenced on page 44 requiring a seal is post-award and will be completed by the awarded contractor.



Item #	Question	Answers
66	To confirm, will the Performance Evaluation on page 58 and 59 be filled out by SEPTA during the contract performance?	Yes. The Performance Evaluation on pages 58 and 59 will be completed by SEPTA during the course of contract performance.
67	Numbered item 4: Price Proposal states: "Consultant shall assume no more than 100 hours of Course Development time per Course." Is this per year, per various programs, or spread out over the duration of the 5-year contract?	100 hours total per course spread over there 5-year contract.
68	Under the heading Classroom Facilities and Supplies, Number 2 states: "Consultant will provide participant workbook" It's unclear if these printed participant workbooks can be billed as extra since, on an average year, they're approximately 300 training days. Based on the number of programs per month and the amount of 27 participants per class, this is a considerable expense for printed material. Please clarify. If the workbooks are billable, should we place an additional line item of costs within the Price Proposal?	Per the Pricing Proposal. materials should be included
69	Page 30. Workers Comp: Do we need this to cover our Contractors despite them not being employees of our company?	No. Workers' compensation is statutory, and each employer is responsible for providing coverage for its own employees.
70	Page 32. Do we need to complete the Self-insurance Retention form?	Yes.
71	Page 33. Is it a requirement to have Fire Damage Liability for General Liability?	Not necessary for this agreement.
72	Page 33. Is it a requirement to have Auto insurance if we only use public transportation?	SEPTA can accept Hired & Non-Owned Automobile Liability coverage if a vendor does not own any of its own vehicles. H&NO coverage can often be an addition to CGL coverage as opposed to standalone Auto.
73	Page 34. Is it a requirement to have Umbrella Excess Liability Insurance?	SEPTA can accept any combination of Primary (GL) and Excess (UMB/Excess) limits as long as the combined per occurrence limits of the requirements are met.
75	Incident Data and Key Performance Indicators Does SEPTA track KPIs related to frontline employee incidents, customer complaints, escalated interactions, or use-of-force events? Will the selected consultant have access to any of that data as a pre-program baseline? Even summary-level figures would allow the consultant to build a measurement framework anchored to real performance levels.	Vendors should establish the proposal based on their experience.



Item #	Question	Answers
76	<p>Workforce Challenges and Strengths by Training Population From SEPTA's perspective, what are the one or two most pressing behavioral or service delivery challenges for each population listed below? Responses do not need to be exhaustive.</p> <ul style="list-style-type: none"> a) New Bus Operators b) New Assistant Conductors c) Veteran Bus Operators and Conductors d) Veteran Cashiers and Maintenance Custodians e) Operations Division Managers <p>Additionally: Are there populations or work groups where customer service behaviors are already strong and could serve as a model or anchor point for others in the program?</p>	<p>Vendor proposals should include their approach to answering these questions.</p>
77	<p>Immediate Improvement Priorities at Program Launch Are there specific behaviors or service delivery moments where SEPTA wants to see improvement quickly, before longer-term culture change takes effect? Knowing those priorities by population allows the consultant to sequence content intentionally rather than treating all topics as equal weight at launch.</p>	<p>Frontline Operators (Bus, Trolley, Rail) – Immediate Safety Focus. Priority behaviors needing rapid improvement: Early recognition of escalation cues (noncompliance, boundary testing, agitation, crowd dynamics) Consistent use of verbal de-escalation techniques before enforcement actions Boundary-setting without confrontation (clear, calm directives; avoiding power struggles) Safe disengagement decisions—knowing when not to continue an interaction and instead pause, isolate, or summon support. Critical service moments: Fare disputes and enforcement interactions Service delays and reroutes, especially during peak hours Requests related to rules enforcement (smoking, loitering, disruptive behavior) Overcrowding and boarding conflicts. Why this comes first: These moments account for a disproportionate share of operator assaults and near-miss incidents. Rapid improvement here can yield immediate reductions in risk exposure before broader culture change takes hold.</p>



Item #	Question	Answers
78	<p>Definition of Success by Training Population What does success look like for each population in concrete terms? For example: reduced complaints in the first 90 days for new operators, supervisor ratings at six months, re-engagement metrics for veterans, or team reinforcement behaviors for managers. Specificity here allows the consultant to design evaluation instruments that measure what SEPTA actually tracks.</p> <p>New operators: Veterans: Cashiers and maintenance staff: Operations managers:</p>	Please reference attachment C in the addendum 01
79	<p>Secondary Trauma and Employee Wellbeing Has SEPTA observed signs of secondary traumatic stress, compassion fatigue, or burnout in frontline employees from repeated exposure to opioid crises, psychiatric emergencies, or hostile rider interactions? Is the selected consultant expected to address this within the curriculum, or does SEPTA manage it through a separate employee assistance program?</p>	SEPTA has an EAP Program available to all employees
80	<p>Prior Training Gaps Without disclosing proprietary information, can SEPTA describe content gaps, delivery weaknesses, or recurring feedback themes from the prior program?</p>	No. Any discussions of this nature will be held with the contract awardee.
81	<p>What Is Working in the Current Program The scope references feedback and lessons learned from the existing contract. From SEPTA's perspective, what elements of the current training program have worked well and should be carried forward or built upon in the new contract? Understanding what is resonating with participants and delivering value informs a design that strengthens what already exists rather than replacing it from scratch.</p>	No. Any discussions of this nature will be held with the contract awardee.



Item #	Question	Answers
82	<p>Cohort Composition and Group Dynamics Are participants in each cohort drawn from a single depot or facility, or from multiple locations? Are there known dynamics within cohorts, such as generational differences, long-tenure versus new-hire friction, or facility-specific culture, that the consultant should account for when structuring group activities? Additionally: Are there cohort dynamics that tend to accelerate learning or create strong peer accountability within the classroom? Knowing what brings groups together productively is as useful as knowing where tensions exist.</p>	<p>Groups are comprised of individuals based on the class: New Hires, Veteran Operators, Conductors, Asst. Conductors, Operations Managers, etc.</p>
83	<p>Rider Satisfaction Survey Data Does SEPTA currently administer rider satisfaction surveys that capture frontline employee interaction quality as a distinct metric? If so, can SEPTA share summary-level results or trend data? That baseline would be the natural starting point for measuring the program's impact on rider experience.</p>	<p>Rider satisfaction survey data can be found on SEPTA.org.</p>
84	<p>Five-Year Customer Satisfaction Targets What specific customer satisfaction improvement targets, if any, has SEPTA set for the contract period? For example, a target reduction in complaint volume, an improvement in satisfaction scores, or a net promoter score goal. A program designed around known targets is more likely to produce results SEPTA can point to.</p>	<p>SEPTA will be publishing a new 5-year strategic business plan at the end of this fiscal year. The Plan will provide guidance in terms of organizational priorities, values, broad brush strategies. SEPTA reports quarterly on its public facing website customer service KPI results. Variables that factor into our overall customer satisfaction includes service reliability, employee courtesy, onboard and station security and cleanliness, and ease of traveling and fare purchase.</p>
85	<p>Complaint Root Cause Analysis How does SEPTA categorize complaints related to employee behavior? Have root cause patterns been identified, such as communication failures, inadequate de-escalation, or gaps in Americans with Disabilities Act (ADA) service delivery? That analysis would allow the consultant to build content around documented problem areas rather than assumed ones</p>	<p>All customer complaints are entered into Veritas, SEPTA's Customer Relations Management system. Complaints are aggregated and trends identified. Individual customer complaints are researched and resolved, and if warranted, discipline is assessed.</p>



Item #	Question	Answers
86	<p>Workforce Development Strategy</p> <p>Does SEPTA have a formal talent development or workforce strategy that this program should align to? If so, what are the stated priorities for workforce growth, retention, or capability development that the training should support?</p>	<p>SEPTA will be publishing a new 5-year strategic business plan at the end of this fiscal year. The Plan will provide guidance in terms of organizational priorities, values, broad brush strategies. Frontline service providers, like new bus operators are typically an entry path into a life-long career at SEPTA. Many go on to management of the operational mode they begin in, while others move into other areas of the organization. We provide this training to equip service providers with the ability to manage a difficult customer climate, while still maintaining their own health, safety, and welfare. The job can be challenging for many and is also critical to the overall operations of SEPTA. Those who are successful in customer service roles find they have significant opportunities within SEPTA. We place a premium value on growing internal talent.</p>
87	<p>Performance Evaluation and Incentive Alignment</p> <p>Is customer service performance tied to employee or manager performance evaluations, merit increases, or incentive programs? If so, the consultant would factor that connection into how training objectives are framed and reinforced. If it is not currently tied to evaluations, does SEPTA anticipate making that connection during the contract period?</p> <p>Additionally: Are there existing recognition or reward approaches that have visibly motivated frontline or manager behavior in the customer service space, even informally? Those examples can inform how the program reinforces positive behavior.</p>	N/A
88	<p>Executive Reporting on Program Outcomes</p> <p>Will the selected consultant be expected to provide program outcome reports to SEPTA's executive leadership? If so, what format, frequency, and level of detail are expected, and are there specific metrics/ leadership tracks that the reporting should address?</p>	N/A



Item #	Question	Answers
89	LMS Platform and Training Credit Requirements Does SEPTA use a Learning Management System to track training completion and issue credit to employees? If so, what is the platform? Will the selected consultant be required to register session completions, push post-training evaluations, or house related course materials through that system?	No
90	HRIS System What is SEPTA's Human Resources Information System? Knowing the system helps the consultant understand how learner rosters are generated, how training records flow to employee files, and whether there are any data integration requirements the proposal should address.	No data integration requirements
91	Classroom Technology at 1234 Market Street Beyond the projector and AV equipment listed in the scope, what technology is available in the training rooms at 1234 Market Street? For example: internet connectivity for participants, access to SEPTA's intranet during class, or compatibility with interactive tools such as digital polling or collaboration platforms?	Internet connectivity, access to SEPTA network for class. Instructor email (SEPTA) establishment.
92	Technology-Enhanced Delivery Methods Is SEPTA open to technology-enhanced delivery methods within any portion of the curriculum, such as scenario-based digital practice tools, simulation exercises, or digital polling for knowledge checks? Or do operational and facility constraints require all delivery to be fully analog and in-person?	All classes should be designed as instructor-led.
93	Non-Negotiable Customer Service Standards Across All Populations Are there specific customer service behaviors, service standards, or performance expectations that every employee must demonstrate regardless of role or tenure? For example, specific communication protocols, accessibility accommodation requirements, or system-wide service commitments the training must cover at every population level?	Authority Standard Rules lay out what is expected of employees when it comes to customer service and can be provided to the contract awardee



Item #	Question	Answers
94	<p>Baseline Policies, Procedures, and Processes to Incorporate</p> <p>Are there existing SEPTA policies, procedures, or operational processes that the curriculum should incorporate directly, such as the customer service policy, code of conduct, ADA accommodation procedures, or escalation protocols? Will the selected consultant have access to those documents during the design phase? Additionally: Are there internal communications, recognition programs, or service stories from SEPTA's own workforce that have been used effectively to reinforce customer service values and could be woven into curriculum content as examples or case material?</p>	<p>Part 1: Yes internal policies and procedures governing ADA, various protocols exist. Part 2: N/A</p>
95	<p>Internal Subject Matter Experts</p> <p>Are there internal SEPTA subject matter experts available to support curriculum design, such as frontline supervisors, HR professionals, Transit Police personnel, or training coordinators? If so, what is the process for scheduling and engaging them, and are there constraints on their availability?</p>	<p>Can be scheduled with the appropriate parties as needed</p>
96	<p>Customer Communication During Safety Incidents</p> <p>How are customer interactions during safety-related incidents currently handled by frontline employees? Is the selected consultant expected to incorporate safety-specific communication protocols into the curriculum, or does a separate safety training program address those scenarios?</p>	<p>SEPTA has safety protocols set by System Safety and Regularity agencies. Any information of this nature will be shared with the awardee.</p>
98	<p>Post-Training Reinforcement Mechanisms</p> <p>Are there existing coaching, observation, or reinforcement mechanisms in place after training completion, such as supervisor check-ins, on-the-job observation, or peer support structures? Knowing what is already in place allows the consultant to design program elements that connect to and strengthen those existing structures. Additionally: Where those mechanisms already exist, what has worked best in translating classroom learning into sustained on-the-job behavior change?</p>	<p>Peer Coaching is planned, but not yet implemented.</p>



Item #	Question	Answers
99	<p>City of Philadelphia and Commonwealth of Pennsylvania Requirements</p> <p>Are there City of Philadelphia or Commonwealth of Pennsylvania ordinances, regulations, or codes that govern how SEPTA employees must interact with the public, such as language access requirements, anti-discrimination protections, or customer rights regulations, that the curriculum must incorporate or reference?</p>	Don't Know
100	<p>Federal Regulations Affecting Frontline Customer Interactions</p> <p>Beyond general Federal Transportation Administration (FTA) requirements, which federal regulations directly govern how SEPTA frontline employees must interact with specific rider populations? For example, ADA obligations, Title VI of the Civil Rights Act, or Rehabilitation Act requirements? Knowing which regulations carry legal exposure allows the consultant to prioritize compliance-critical content appropriately.</p>	Don't Know
101	<p>Language Access and Multilingual Participant Needs</p> <p>Does SEPTA serve a multilingual rider population that creates specific language access obligations for frontline employees? If so, are there language access requirements that training content must address? Additionally, are there frontline employees for whom English is a second language, and would that affect instructional design or delivery considerations?</p>	No, all material should be delivered and presented in English.
102	<p>Demonstration Video Subject Matter</p> <p>Should the 20-minute facilitation demonstration reflect content specific to SEPTA's frontline transit workforce context, such as de-escalation, working with a person in crisis, or a difficult customer interaction in a transit environment? Or may it address customer service broadly? The RFP identifies this as the highest-weighted evaluation criterion, so clarity on scope is important.</p>	Requirements are stipulated in the SOW.
103	<p>Demonstration Video Technical Requirements</p> <p>Are there specifications for the video file, such as format, resolution, or maximum file size, that proposers should follow to ensure the submission is accessible to all members of the evaluation committee?</p>	See response to Q 13.



Item #	Question	Answers
104	<p>Facilitation Support Staff May the selected consultant bring facilitation support personnel to training sessions to assist with room setup, materials distribution, sign-in, and note-taking? Those individuals might include experienced professionals or supervised college students or interns in a support role. If support staff are permitted, must their resumes be included in the proposal, or may they be identified separately given that support personnel/ non facilitators may turn over across a five-year contract?</p>	<p>Training Department Coordinators facilitate all classroom set-up. Any additional support personnel can be identified separately and will require lobby security desk sign-in. This personnel will not facilitate any training and only serve to support the Instructor(s)</p>
105	<p>Instructor Building Access and Security Clearance Timeline The contract references SEPTA's right to impose personnel security measures, including background investigations, on contractor staff working on SEPTA property. What is the anticipated timeline for completing those requirements after contract award, and will the clearance process be complete before the first scheduled training session?</p>	<p>Please refer to Section 25, Personnel Security Measures, of the Contract. This section outlines SEPTA's rights regarding personnel access and security requirements. The contract does not define a specific timeline for completion of these requirements, and any related coordination will be addressed following contract award in collaboration with the selected contractor.</p>
106	<p>Updated Pricing Form SEPTA indicated at the pre-proposal meeting that the pricing sheet may be updated to include a column for total curriculum development hours. Will an updated form be issued as a formal addendum before May 14, and should proposers wait for that form before finalizing the Price Proposal?</p>	<p>Please see response to Q 38.</p>
107	<p>Program Design and Implementation as a Separate Cost May proposers include a distinct Program Design and Implementation phase as a separate Year 1 line item, covering activities such as needs assessment, stakeholder input, curriculum customization, and instructor onboarding? Or must all costs be bundled into the per-hour delivery rates on the existing pricing form?</p>	<p>Separate costs associated with Course Development, Course Modification only</p>
109	<p>Proposal Delivery Recipient Confirmation The ITB identifies Karen Cyphers, Sr. Contract Administrator, as the recipient for hand-delivered proposals at 1234 Market Street, 11th Floor. Can SEPTA confirm that is the correct recipient and address for the May 14, 2026 submission, and whether any specific check-in or receipt procedures apply for hand-delivered proposal packages?</p>	<p>Please see response to Q 30.</p>



Attachment A

**PRICING PROPOSAL FORM FOR RFP #26-00025-AKQC
 Customer Service Social Skills Training for Surface / Rail Transportation and Station Personnel Project**

Up to 68 Course Offerings not to Exceed 300 Days per Year	Course Development Qty=1/audience	Year 1	Year 2	Year 3	Year 4	Year 5	5-Year Total, (include Course Development)
A. New Bus Operator (Approx. 16 Classes/Year)							
B. New Assistant Conductor (Approx. 16 Classes/Year)							
C. Veteran Bus Operator/ Asst. Conductors/Cond/Passenger Services Representatives (Approx. 16 Classes/Year)							
D. Veteran Cashiers/Maintenance Custodians (Approx. 15 Classes/Year)							
E. Operations Manager (Approx. 5 Classes/Year)							
TOTALS (A through E):							

Hourly Billing Rate for Course Modifications after initial Course Development:

All Materials, ODCs, and Travel to execute each class shall be included in the prices above. ----- Travel, lodging and meal shall comply with Federal per Diem rates.
 Prices shall be based upon the approximate number of classes/year. ----- Course Development cost shall be the price to develop each course.

Notes:

1. The Customer Service Social Skills Training course shall be presented for audience lines A through D, above.;
2. The Customer Service and Motivational Techniques, Communication and Conflict Management Skills Training course shall be presented for audience line E, above.; and,
3. This is an as-required contract. All quantities listed above are estimates only, and SEPTA is not obligated to expend any specific amount.
4. Consultant shall assume no more than 100 hours of Course Development time per Course.



Addendum No. 01
Dated: May 6, 2026
Page 21 of 25

Attachment B



SEPTA SOLICITATION STATISTICS

In accordance with Federal Regulation 49 CFR part 26.11, SEPTA must maintain statistics on all contractors and subcontractors bidding/proposing on SEPTA projects. Please include copies of this form with your bid/proposal package to any potential subcontractors/subconsultants. All Bidders/Proposers are required to submit a completed survey for themselves and all potential subcontractors/subconsultants.

Thank you for your assistance with this request. If you should have any questions, comments, or suggestions, please contact SEPTA's DBE Program Office at 215-580-7278, or via email at DBEProgram@septa.org.

The information gathered on this form will be used for statistical purposes only.

Firm Name: _____

Firm Address: _____

Description of Services: _____

NAICS* Codes: _____

* North American Industry Classification System (www.census.gov/epcd/www/naics.html)

Status: DBE _____ SBE _____ OBE _____
 (Disadvantaged Business Enterprise) (Small Business Enterprise) (Other Business Enterprise)

Month/Year firm established: _____

Company Owner(s) Ethnic Group Membership: *(optional)*

- Black
- Hispanic
- Native American
- Asian Pacific
- Subcontinent Asian
- Other *(specify)* _____

Annual Gross Receipts of the Firm: *(check one)*

Less than \$500,000	_____	\$500,000 - \$1 Million	_____
\$1 Million - \$5 Million	_____	\$5 Million - \$10 Million	_____
\$10 Million - \$20 Million	_____	Above \$20 Million	_____

Project Name: _____ Bid Number: _____

Name: _____ Date: _____
(Please Type or Print)

Title: _____

Signature: _____

Email Address: _____ Telephone No.: _____



Attachment C

New operators: **New Operators (0–18 months)**

Primary objective: Rapid risk reduction and confidence building while operators are most vulnerable.

Success indicators (concrete and time-bound):

- **First 90 days**
 - Reduction in customer complaints tied to operator conduct (tone, escalation, fare disputes)
 - Fewer preventable conflict incidents compared to historical new-hire cohorts
 - Demonstrated use of de-escalation language and disengagement protocols in coaching ride-alongs
- **6 months**
 - Improved safety incident ratios relative to route and time-of-day averages
 - Supervisor ratings show consistent adherence to conflict-management procedures
 - Reduced stress-related absenteeism compared to baseline expectations
- **12–18 months**
 - Retention rates exceed prior new-hire averages
 - Operators self-report confidence in managing disputes without supervisory intervention

Why this matters:

Early success for new operators is less about perfection and more about **avoiding preventable escalation while building safe habits**. Support retention throughout the Authority.

Veterans:

Primary objective: Re-engagement, consistency, and recalibration of long-standing habits.

Success indicators:

- **Within 90 days**
 - Decrease in repeat complaints linked to the same operators or routes
 - Fewer escalations that require supervisor or police intervention
- **6 months**
 - Re-engagement metrics improve (less disengaged behavior, better attendance stability)
 - Peer feedback reflects more consistency in tone and rule communication
- **9–12 months**



Addendum No. 01
Dated: May 6, 2026
Page 23 of 25

- Veteran operators demonstrate leadership behaviors (modeling calm responses, informal mentoring)
- Reduced “burnout signals” such as excessive sick time tied to conflict stress

Why this matters:

Success for veterans is not retraining basics, but **unfreezing patterns** that may increase risk over time.

Cashiers and maintenance staff:

Primary objective: Reduce conflict spillover and improve safety in high-contact, fixed-location environments.

Success indicators:

- **First 90 days**
 - Fewer reported verbal altercations or confrontations at booths and shops
 - Improved confidence in redirecting frustrated customers/operators without escalation
- **6 months**
 - Increased use of escalation-avoidance and referral protocols rather than direct confrontation
 - Reduced calls for security tied to interpersonal conflict
- **Ongoing**
 - Improved internal customer satisfaction (operators interacting with maintenance and cashiers)
 - Fewer HR interventions related to communication breakdowns

Why this matters:

These roles are often overlooked but experience **intense, repeated micro-conflicts** that shape system-wide tension.

Operations managers:

Operations Managers and Supervisors

Primary objective: Reinforce safety-first decision-making and align frontline behavior.

Success indicators:

- **Within 90 days**
 - Supervisor guidance during live incidents prioritizes safety over schedule recovery
 - Operators report consistent messaging when calling for support
- **6 months**



Addendum No. 01

Dated: May 6, 2026

Page 24 of 25

- Supervisor evaluations reflect effective coaching on de-escalation and disengagement
- Fewer inconsistencies in incident response decisions across shifts and divisions
- **12 months**
 - Managers visibly reinforce training concepts in briefings, incident reviews, and coaching sessions
 - Reduction in repeat incidents tied to supervisory misalignment or delayed decision-making

Why this matters:

Training fails without reinforcement. Manager success is measured by **what they tolerate, coach, and model**, not what they say.



Addendum No. 01
Dated: May 6, 2026
Page 25 of 25

Addendum No. 01

Request for Proposal #26-00025-AKQC

Customer Service Social Skills Training for Surface and Rail Transportation and Station Personnel

The attached Addendum No. 1 to the Contract Documents is hereby made part of the same and is incorporated in full as part of the Project.

Proposer should acknowledge Addendum No. 1 by signing and returning the Acknowledgement Sheet with the Technical Proposal.

NOTICE

I hereby certify that the changes covered by this Addendum No. 1 have been taken into account in the total price of the proposal.

FIRM NAME (typed or printed) _____

AUTHORIZED SIGNATURE _____ **TITLE** _____

NAME (typed or printed) _____ **DATE** _____

Addendum No. 1 includes:

1. Questions 1—41, 50—53, 55—73, 75-107, and 109.
2. Attachment A
3. Attachment B
4. Attachment C