



**West Contra Costa
Transportation Advisory Committee (WCCTAC)**
A Public Joint Powers Agency

REQUEST FOR PROPOSALS

DATE ISSUED: WEDNESDAY AUGUST 3, 2016

**PREPARATION OF A NEEDS ASSESMENT STUDY
OF WEST COUNTY MEASURE J FUNDED SERVICES
FOR SENIORS AND PEOPLE WITH DISABILITIES**

PROPOSAL PACKAGES DUE: FRIDAY, August 26, 2016 at NOON

West Contra Costa Transportation Advisory Committee
6333 Potrero Avenue, Suite 100
El Cerrito, CA 94530

WEST CONTRA COSTA TRANSPORTATION ADVISORY COMMITTEE (WCCTAC) REQUEST FOR PROPOSALS

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INTRODUCTION

The West Contra Costa Transportation Advisory Committee (WCCTAC) seeks a qualified consultant team to undertake a study of existing paratransit services in West Contra Costa County (West County). The budget for the Study is not to exceed \$75,000. The Consultant selected will assist WCCTAC and its paratransit partners in evaluating the effectiveness of the existing service delivery models. These partners include: the cities of Richmond, El Cerrito and San Pablo as well as the American Disability Act (ADA) operators; specifically WestCAT and East Bay Paratransit Consortium (EBPC).

Interested firms must submit five (5) copies of their proposal by noon, Friday, August 26, 2016. Proposals received after that date and time will not be considered. If deemed necessary, interviews with consultants are tentatively scheduled for September 13, 2016. Total proposal length should not exceed 15 pages.

Proposals will be considered firm offers to enter into a contract and perform the work described in this RFP for a period of ninety (90) days from the date of submission.

Proposals and all inquiries relating to this RFP shall be submitted to the staff person at the contact information shown below:

Joanna Pallock, Project Manager
WCCTAC
6333 Potrero Avenue, Suite 100
El Cerrito, CA 94530
jpallcock@wcctac.org
510.210.5934

SECTION 1: BACKGROUND INFORMATION

WCCTAC

WCCTAC is one of four regional transportation-planning committees (RTPC) in Contra Costa County. It has been in existence since 1988 and formally became a Joint Powers Agency in 1990. WCCTAC is governed by a Board of Directors. The Board is comprised of elected representatives from five member cities (El Cerrito, Hercules, Pinole, Richmond, and San Pablo), Contra Costa County, as well as three transit agencies: BART, AC Transit, and WestCAT. WCCTAC is charged with assessing the transportation needs of the West Contra Costa region, coordinating the actions of its members, and making policy and funding decisions regarding transportation issues.

General Setting

West Contra Costa County is a distinctive sub-region within the Bay Area set between the San Francisco Bay and the East Bay hills. It contains a small downtown core in the City of Richmond, some relatively dense suburban neighborhoods built before World War II, and many lower density suburban areas. The cities of San Pablo and Richmond have larger populations of disabled residents than the rest of the cities/county. There are several mid-size senior housing facilities in both cities, as well as in El Cerrito. The largest hospital is Kaiser-Richmond, with a medical office in Pinole.

The closure of the Doctors Medical Center last year shifted many medical trips to medical providers outside of West County, including Martinez, Vallejo and Berkeley/Oakland area. There is speculation that longer trips and transfers have impacted the community but there has not been any substantial data collection to interpret exactly where trips have gone and how many people are impacted.

There are three city-operated paratransit services in West County: El Cerrito, San Pablo and Richmond. There are two bus transit operators serving West County. The transit operators provide federally mandated ADA services and in WestCATs case, they also provide non-ADA trips in their area.

There are also numerous non-profits focused on mobility programs in West County. The two agencies most closely linked with the paratransit services include a volunteer driver program and travel training program. *Mobility Matters* is a non-profit headquartered in Lafayette that serves the entire county on a host of mobility issues. *The Center for Independent Living (CIL)* has a contract to offer travel training in West County for one year. Other efforts like this are expected to grow in the next few years.

Background on Funding Practices for Paratransit in West Contra Costa

Transportation programs for seniors and people with disabilities have a long and varied history in Contra Costa County. The passage of the Americans with Disabilities Act (ADA) in 1990 had a significant impact on how funding was allocated to “paratransit” or accessible transportation services. Most importantly, funding has been unable to keep up with demand as the aging population continues to rise.

In the 1980s and prior to the ADA, many cities that operated “senior buses” shifted service to the local transit operators along with the Transportation Development Act (TDA) funding to support them. Some cities, however, retained their senior bus programs, namely Richmond, El Cerrito, and San Pablo. After ADA, the TDA funding received by the cities for their services was given to the public bus transit operators to fund ADA complementary services, leaving the cities dependent on local sales tax and general fund revenues in order to maintain local non-ADA paratransit services.

The passage of Measure J reinforced the funding under Measure C by requiring that operators receiving Measure C funding be guaranteed the same percentage under Measure J (2.97% Countywide). Measure J also added East Bay Paratransit Consortium (EBPC)¹, the ADA complementary paratransit service for AC Transit and BART in West County, as an eligible recipient.

To address the growing aging population and increased demand for these services, Measure J built in a percentage growth factor to the countywide program (Program 15). For the first year of Measure J, the program received 3.5% of transportation sales tax revenue on a countywide level. Each year .1% is added, with the program receiving 5.9% in the last year. For West County, the annual allocation starts at 1.225% and increases by .035% annually to a final year allocation percentage of 2.065%.

WCCTAC set aside additional funds for *Additional Transportation for Senior and People with Disabilities* of .065% annually (Program 20b). Each year, when the five West County operators claim Program 15 funds through CCTA, they also bring a request to WCCTAC for an allocation of 20b funds. The intent of the additional allocation was to fund “new” services to help address the anticipated growth in demand for accessible transportation.

Beyond the continued operation of current services and programs, Measure J provides funding for the other eligible uses of Program 15 funds including:

- (a) managing the program,
- (b) retention of a mobility manager,
- (c) coordination with non-profit services,
- (d) establishment and/or maintenance of a comprehensive paratransit technology implementation plan, and
- (e) facilitation of countywide travel and integration with fixed route and BART specifically, as deemed feasible.

The economic downturn of 2008 coincided with the beginning of Measure J, and both the Program 15 and 20b revenues fell below the projected Measure J revenues. This resulted in operators requesting to amend Measure J, allowing them to use Measure J funding to maintain existing services as opposed to the intended use of new services. In 2010, WCCTAC staff brought the Board a proposal to conduct a study to determine the best way to allocate the 20b funds. The Board chose to revisit the study concept after the economic downturn ended. Now, in 2016, the Board believes that it's a good time for a study to review all Measure J funded

¹ East Bay Paratransit Consortium (EBPC) was created in the mid-1990s to serve as the ADA complementary paratransit service for AC Transit and BART. It was not in existence at the time the countywide paratransit plan was written and was not considered for funding allocation.

paratransit programs in West County and start the discussion of how to incorporate the non-ADA services into the mobility management framework.

Purpose of Study

There are four key purposes that this study is designed to accomplish.

1. First, the study will evaluate the current paratransit programs funded under Measure J to closely examine how well services are meeting current and projected needs.
2. Second, the consultant will develop a public outreach plan and then solicit input from the public on what services they use, what services they desire and where the gaps exist under the current systems in place now.
3. Third, the study will determine where residents are going or want to go. The consultant should pay particular attention to medical trips (outpatient and in-patient) and any potential gaps.
4. Finally, in an effort to better position the sub-region to receive mobility management funding, the study will present mobility management options. Information will be gathered from surveys and workshops, to propose enhanced services for the senior and disabled population over the next five to 10 years. This information would also feed into efforts to develop a Countywide Accessible Transportation Strategic Plan.

SECTION 2: SCOPE OF WORK

1. Final Scope

Collaboratively develop a final scope, budget by task, work plan, and schedule for the study that also delineates the roles and responsibilities of the prime consultant, its sub-consultants, and other study participants. Provide WCCTAC with a list of data and information that will be needed to complete the study.

Deliverable #1 – Final scope, budget by tasks, schedule, work plan, and list of data needs.
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2. Evaluation of Existing West County Non-ADA Service Network

Document the existing Measure J funded ADA and non-ADA services and programs in West County in a format that will include all elements of operations including but not limited to: hours of operations, fares, services offered, ridership data, staffing model, historic practices, vehicle inventory, communications and outreach practices, rider assessments, driver

training schedule, maintenance costs, rider enrollment and data base maintenance, contracts for additional services, and organizational structure. The Consultant will work with CCTA, WCCTAC and the operators to collect and confirm data.

Deliverable #2 – Technical Memorandum #2 – Evaluation of Measure J funded non-ADA and ADA Service Network including maps, boundary details and any current written or informal agreements between parties for outside boundary service pick-up and drop-off.

3. Current Data on Trips and Gaps

Documenting the types of trips taken by paratransit users is essential to addressing where the needs are and where the gaps reside for current and future customers. The consultant will collect the most recent data on medical and non-medical paratransit trips in and around the West County region to determine where new services are needed and where existing services can be improved. Tie together this deliverable with the public outreach efforts in #4.

Deliverable #4 – Technical Memorandum #3 on Travel Markets to Access Medical Services in and around West County

4. Public Participation

Develop a public participation plan that lays out the process for collecting input from a variety of sources (stakeholders, current users, potential users and staff).

4.1. Public Outreach Efforts

The consultant should work with WCCTAC and the West County Mobility Management Group in the preparation and dissemination of public materials. This effort will include a survey and at least two workshops in West County with the targeted population with assistance from local member agencies. The consultant will document all meeting outcomes with summaries that include photos, results of any exercises, and comments from the meeting participants.

Deliverable #4 – Memo with Summary of Outreach Efforts. Manage all outreach efforts along with staffing and facilitating public workshops. Create graphic materials as needed. Summary reports delivered summarizing learnings from each public workshop.

5. Conceptual Enhancements and Possible Efficiencies

After gathering data from the areas listed above, the consultant will prepare a document showing where existing services are meeting current needs, where existing services could be enhanced, what services could be added to create greater efficiencies and finally, a summary of what was learned from efforts 1-4 above. This task will be the crux of the Final Report.

Deliverable #5 – Technical Memorandum #5 – Conceptual Enhancements and Possible Efficiencies

6. Produce draft and final report

Prepare a Draft Final Report and a subsequent Final Report that present concise, readable results that are graphically engaging, reflective of the technical findings, and reflective of the results of the public outreach and the processes involved to obtain the results. The bulk of this task will be compiling and selecting relevant information from those prior documents to create a brief, graphically sophisticated final report that engages the reader.

Deliverables #6 – Draft Final Report and Final Report

SECTION 3: PROJECT MANAGEMENT (CONSULTANT)

Team Meetings

An initial project team meeting, including both key agency staff and consultants, will be held to refine the work program and schedule and to clarify responsibilities. Additionally, monthly meetings of the project team will be held. These meetings may take the form of conference calls.

Deliverables – Monthly invoices and progress meetings. Regular project management duties, including issuing monthly invoices and progress updates.

Technical Advisory Committee (TAC)

The West County Mobility Management Group will act as an advisory body for the study, as well as serving as a source of expertise. In addition, the consultant team will bring occasional updates to the WCCTAC-TAC meetings. Updates on outreach efforts will also be brought to WCCTAC Board meetings. The consultant will provide memorandums and other materials (PPT presentations, etc.) for these meetings. The consultant will also provide status reports as required for other policy boards involved in the study. Meeting summaries will be documented. The draft final report will be brought to all three groups. The Final Report will be brought to the WCCTAC Board.

Deliverable – Memoranda and other supporting material (graphics, boards, Powerpoints, etc.) for policy board meetings.

Proposed Project Timeline

Tasks	Timeframe
Task 1. Final Scope, budget, work plan and schedule	November 2016
Task 2. Summary and Evaluation of Prior Studies	November 2016
Task 3. Evaluation of Non-ADA Network	November and December 2016

Task 4. Data on Medical Trips and Gaps	February 2017
Task 5. Conduct Public Outreach Efforts	March 2017
Task 6. Conceptual Enhancements and Possible Efficiencies as well as Preliminary Cost Estimates	May 2017
Task 7. Draft Final Report and Final Report	June 2017

SECTION 4: PROPOSAL PACKAGE SUBMITTAL REQUIREMENTS

1. *Proposal Package:* Submit five (5) hard copies of your proposal package along with one electronic copy emailed to jpallock@wcctac.org in Microsoft Word or Adobe Acrobat format. The proposal package should have no more than 15 pages. Resumes and other supplemental information are not counted in the page count and should be included in an appendix. Quality rather than quantity should be stressed.

2. *Transmittal Letter:* The proposal package shall be transmitted with a cover letter describing the firm's/team's interest and commitment to the proposed projects. The letter shall state that the cost proposal shall be valid for a 90-day period and should include the name, title, address, email, and telephone number of the individual to whom correspondence and other contacts should be directed during the consultant selection process. The person authorized by the firm/team to negotiate a contract with WCCTAC shall sign the cover letter.

3. *Project Understanding:* Describe your understanding of the scope of work and specifically how you would collect data relevant to trips in and around the County. Describe your previous experience with holding public information and outreach efforts with senior and disabled populations.

4. *Management Plan and Schedule:* This section shall provide the firm's/team's proposed management plan for providing the services, including the staff proposed for the project. Develop a proposed schedule, identifying major project milestones and the anticipated duration for each major activity or deliverable. Specific hours or other cost information is not to be included.

5. *Qualifications and Experience:* Each package shall provide the qualifications and experience of the consultants. Please emphasize the specific service role provided as they relate to each project. Key team members are expected to be committed for the duration of each project. Replacement of key team members will not be permitted without prior consultation with, and approval of, WCCTAC.

6. *Additional Relevant Information:* Provide additional relevant information that may be helpful in the selection process (not to exceed the equivalent of 2 single-sided pages).

7. *References:* Please provide three references (including contact names and current phone numbers) that indicate the ability of your firm (team) to successfully manage these projects.

8. *Project Budget:* Compensation shall be administered based on an agreed **Not to Exceed Contract Amount**. Under separate cover and submitted in a sealed envelope, please provide one copy of cost information for project with estimated hours for all proposed staff and sub-consultant. Budget is to include all direct and indirect costs expected and any sub consultant mark-ups.

9. *Professional Services Contract:* Indicate your willingness to accept the terms and conditions in attached sample consulting services agreement (Attachment B), including your ability to comply with WCCTAC's insurance requirements, or list those to which you take exception, and, as appropriate, provide proposed alternate wording. Note that it is not WCCTAC's intent to make substantial changes to attached sample contract.

Proposal Package Submittal Procedure

The proposal packages shall be submitted in accordance with the following requirements:

1. The proposal packages shall be transmitted with a cover letter as described above.
2. The proposal packages shall be addressed to:

Joanna Pallock, Project Manager
West Contra Costa Transportation Advisory Committee (WCCTAC)
6333 Potrero Avenue, Suite 100
El Cerrito, CA 94530

3. The proposal package shall be dispatched in order to be received at the above address no later than 12:00 p.m. on Friday, August 26, 2016. Late qualification packages will not be accepted and will be returned unopened.

4. Questions pertaining to this RFP, the Scope of Work, or the cost proposal should be directed in writing via email to:

Joanna Pallock
jpallock@wcctac.org

WCCTAC will make every effort to provide individual responses to all written questions submitted and will not respond to questions posed by any means other than e-mail. Responses to technical questions may take up to two working days and all responses (with questions) will be posted on WCCTAC's website: www.wcctac.org. **Questions must be submitted no later than 12:00 p.m. Wednesday, August 17, 2016.**

SECTION 5: SELECTION PROCESS AND DATES

The following criteria will be used to evaluate qualification packages and to select a consultant team:

1. Demonstrated ability on past projects to managing project scope, schedule and budget to deliver projects expeditiously;
2. Qualifications and experience of the firm(s), the designated project manager and key staff in similar undertakings;
3. Demonstrated experience with West County transit and paratransit agencies.

A panel will evaluate qualification statements and develop a ranking of the most qualified consultants. The panel will include representatives from member agencies, WCCTAC staff and CCTA staff. Members of the panel will not be revealed prior to interviews. Interviews may be conducted with the most qualified teams. The Project Manager and key team members are expected to attend the interview. In lieu of interviews, WCCTAC may request supplemental information and/or clarifications to the qualification/proposal package.

The evaluation panel will select a qualified proposal and will submit the proposal to the full WCCTAC Board of Directors for award of a consulting services agreement. The award of the agreement shall be subject to negotiation of all business terms by the WCCTAC executive director and legal review and approval by WCCTAC legal counsel. The decision of the WCCTAC Board shall be final.

SELECTION PROCESS DATES

KEY DATES	
RFP released	August 3, 2016
Submittal of Questions	Noon on Wednesday, August 17, 2016
Posting of Questions to WCCTAC website	Noon on Monday, August 22, 2016
Proposal Packages Due	Noon on Friday, August 26, 2016
Proposal Package Evaluation	Week of September 5-9, 2016
Finalize Contracts	Week of October 17, 2016
WCCTAC Board Contract Approval and Notice to Proceed:	Friday, October 28, 2016

SECTION 6: GENERAL TERMS AND CONDITIONS:

1. Conflicts of Interest. The proposer shall disclose any currently known or potential conflicts of interest with WCCTAC, local West County member agencies, CCTA or the Metropolitan

Transportation Commission. The proposer's signature affixed to and dated on the cover letter shall constitute a certification, under penalty of perjury under the laws of the State of California, that the proposer declares that the proposer is not currently, and will not during the performance of any services for WCCTAC participate in any other work involving a third party with interests currently in conflict or likely to be in conflict with WCCTAC's interests without WCCTAC's approval.

2. Amendments to RFP. WCCTAC reserves the right to amend or cancel this RFP by addendum before the final submittal due date. Revisions to the RFP shall be posted on the WCCTAC web page at least three full business days prior to the deadline for submittal of responses. It is the responsibility of each proposer to check the Web site for any revisions related to this RFP. The proposer shall each confirm in the transmittal letter of its response the receipt of all addenda issued to this RFP.

3. Non-commitment of WCCTAC. This RFP does not commit WCCTAC to award a contract, to pay any costs incurred in the preparation of a response to this request, or to procure or contract for services. WCCTAC reserves the right to reject any or all proposals, including without limitation, the right to reject any or all non-conforming, non-responsive, unbalanced, conditional proposals, or any proposal that WCCTAC believes would not be in the best interest of WCCTAC to award. WCCTAC also reserves the right to waive any inconsequential deviation not involving price, time or scope of work of the proposals. Any discrepancies between written words and figures or words and numerals will be resolved in favor of the figures or numerals.

4. Confidentiality. Before award of the contract, all responses to this RFP will be designated confidential to the extent permitted by the California Public Records Act. After award of the contract (or if not awarded, after rejection of all responses) all responses will be regarded as public records and will be subject to review by the public. Any language purporting to render all or portions of the responses confidential will be regarded as non-effective and will be disregarded.

5. Non-Discrimination and DBE Requirements Pursuant to 49 CFR §26.13, the "Contractor or subcontractor shall not discriminate on the basis of race, color, national origin, or sex in the performance of this contract. The Contractor shall carry out applicable requirements of 49 CFR Part 26 in the award and administration of U.S. DOT-assisted contracts. Failure by the Contractor or subcontractor to carry out these requirements is a material breach of this contract, which may result in the termination of this contract or such other remedy as WCCTAC deems appropriate."

WCCTAC implements the DBE policy in accordance with DOT regulations, and an 8% DBE participation goal has been established for this contract.

6. Communications regarding Proposals. All questions about the meaning or intent of the request for proposal are to be directed in writing by e-mail to the Project Manager of WCCTAC, Joanna Pallock. Do not send communications to the WCCTAC Board Members. Interpretations

or clarifications considered necessary by WCCTAC in response to any questions shall be issued in writing by Addenda to all proposers. Verbal representations and interpretations are non-binding and have no legal effect. *Ex parte* communications with WCCTAC Board Members shall be the basis for disqualification of a proposal from consideration.

Attachments:

A: Sample WCCTAC Consulting Services Agreement: 2680802.1