



FY18 Request for Proposal
for
Contractor to Provide Volunteer Driver Services for the Centralina Region

Individuals submitters should submit their request for proposals by 5:00 PM Eastern Times, October 18, 2017 to the attention of:

Vicki Bott
Centralina Council of Governments 9815 David Taylor, Suite 100, Charlotte, NC 28262

Or email to vbott@centralina.org

Any late proposals will not be considered.

Questions regarding this request for proposal should be directed in writing to Vicki Bott, Grants Development Director CCOG, and submitted via email grants@centralina.org

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I. Existing Volunteer Transportation System Information

Introduction

Centralina Council of Governments (CCOG) is issuing this Request for Proposal (RFP) to hire a contractor to provide Volunteer Transportation Services as part of the existing Mobility Management efforts for the period July 1, 2017 – June 30, 2018. These programs are funded through grants from multiple sources all under the Federal Transit Authority’s Seniors/Elderly/Individuals with Disabilities (5310 and 5317) programs. CCOG’s VTS program provides demand response service transportation (“rides”) to older adults and people with disabilities without other transportation options. The volunteer drivers will use their personal vehicles to provide rides to passengers enrolled in CCOG’s Volunteer Transportation Services (“VTS”) program. The contractor will not provide vehicles for volunteer drivers’ use in the VTS program.

Background

Centralina Council of Governments is a regional planning organization that serves a nine (9) county region. CCOG’s mission is to help the Centralina region find innovative solutions to both existing and future challenges facing Greater Charlotte and to unifying the region’s collective resources to help grow the economy and jobs, improve the quality of life and control the cost of government. The mission of the Volunteer Transportation Services Program is to improve mobility for older adults, veterans and people with disabilities in the Centralina Region through a network of volunteer drivers.

In 2013, CCOG conducted a Mobility Management Study along with local transportation, aging, disability and other human service providers to determine recommendations to address unmet transportation needs the community. The development of Volunteer Transportation Services is a direct response to the extensive community planning conducted during the 2013 Mobility Management Study. In addition, CCOG completed a 2016 study of transportation barriers for older adults and people with disabilities. Recommendations include a variety of best practices to enhance and improve transportation access for older adults including the expansion of volunteer transportation efforts.

In due diligence managing 5310 and 5217 grants, Centralina Council of Governments is following the Federal Procurement requirements and using a Request For Proposals subcontractor selection process. The Volunteer Transportation Services program has been in operation in the 9-county Centralina region for three years.

Service Area:

Volunteer Transportation Services is a regional model and must have the capacity and infrastructure to provide services region-wide:

- Anson, Cabarrus, Gaston, Lincoln, Iredell, Mecklenburg, Stanly, Rowan and Union counties.

VTS Destinations:

- Medical & Non-Medical, non-emergency trips within the nine-county area including across county boundaries.

Background information regarding other available transportation:

The Centralina Region has both fixed and demand response transportation services. There are a wide variety of independent contractors who charge for their services including taxi's. However, transportation remains one of the greatest unmet needs for older adults and people with disabilities in our region. Volunteer Transportation has been created in response to the 2013 Mobility Management study to serve as a safety net for those individuals who do not qualify for or cannot access existing transportation services.

Service Standards:

- Volunteer Transportation Services follows FTA and NCDOT guidelines and has a detailed policies & procedures manual.

Fare Collection:

- Volunteer Transportation Trips are provided at no cost to the passenger, however contributions to the Volunteer Transportation Service are accepted and may be used to defray non-reimbursable costs of operating the Program. No tips are allowed to be accepted for any trips.

Fuel Price Adjustments (<https://www.irs.gov/uac/2017-standard-mileage-rates-for-business-and-medical-and-moving-announced>):

- *N/A. VTS offers mileage reimbursement at the volunteer rate (.14 cents per mile)*

Volunteer Driver personal vehicle procedures and maintenance**Maintenance plan:**

Volunteer Transportation Services utilizes volunteers driving their personal vehicles and requires that the agency maintain files of all current registration and insurance information for each volunteer vehicle. Volunteers are also required to conduct pre and post-trip inspections/ walk arounds to ensure that vehicles are in safe operating conditions. This is outlined in the Volunteer handbook and Policies and Procedures.

II. Project Expectations

This request for proposal does not include determining eligibility of the potential passengers. CCOG conducts passenger screening through the Regional Mobility Management 1 Call, 1 Click center and refers eligible passengers to the Volunteer Transportation Services program.

Below are the minimum expectations for VTS program operation established by CCOG's grantors including:

1. Respondent Eligibility:

The Respondent must be a 501(c)(3) organization.

2. The Respondent will demonstrate capacity to:

A. Volunteer Management: Includes: Recruit, Screen and Train and Retain volunteer drivers and file maintenance

Recruit Volunteer Drivers – Conduct regular, no less than eight (8) community based outreach efforts per month to educate and recruit members of the community to become eligible drivers.

Screening of Volunteer Drivers –Screen prospective drivers to ensure that all minimum qualifications are met, and will notify prospective drivers and CCOG of results. Minimum qualifications are as shown below:

Qualification	Minimum requirements
Age	At least 21 years of age
Driver's license	Current and valid in the U.S.
Passenger vehicle	Owned/leased with current registration and insurance N.C. minimum liability insurance
Safety & background checks	Pass driving record, criminal check, sex offender registry
VTS program rules & requirements, driver training	Agreement to abide by & maintain all minimum requirements, including CCOG-provided driver training

Proposals should describe the Respondent's intended general approach to the screening process, documentation of screening results, and

notification of prospects and CCOG of results of screening, along with proposed quantitative outcomes, anticipated costs and timeline

Training Volunteer Drivers in the nine county region

- This must be regular, multi-modal, and include safety, policy/procedures and customer service.

Retention of Volunteers

- Conduct at least one annual volunteer appreciation event
- Quarterly incentive programs to encourage continued driver success and passenger satisfaction

File Management

- Confidential records are maintained for each individual driver in compliance with Grantor/CCOG policies and procedures and program standards.

B. Trip scheduling capacity, including scheduling software, procedures and staffing. The “Call Center” should have

- Operating hours of Monday to Friday from 9:00 AM to 4:00 PM.
- Passengers must call 72 hours in advance to schedule a trip.
- Requests can be made up to 30 days in advance of the trip.
- Passengers may request trips outside of the regular office hours including evenings and weekends.
- Assisted Rides is the current scheduling software. Any proposal must include scheduling software that is compatible to Assisted Rides.

C. Provide Supplemental automobile liability insurance for qualified volunteer drivers

“All registered volunteers (collectively) of an organization are provided with excess volunteer liability insurance at a limit of 1,000,000.00 per occurrence”

D. Offering mileage reimbursement to volunteer drivers at the National Volunteer Rate (not a grant) supported expense). National Volunteer Rate is .14 cents per mile. Drivers may decline this reimbursement, but it must be offered, and must be at no more and no less than the National Volunteer Rate.

E. Marketing of Volunteer Transportation Services – design and produce marketing materials for use in advertising and in conducting community outreach

F. Conduct community outreach on behalf of Volunteer Transportation Services to recruit volunteer drivers and passengers.

G. Reporting, Quality Assurance & Passenger Satisfaction:

- provide each passenger at each trip an opportunity to provide written feedback about their trip experience, and compile, analyze, and produce periodic reports of summary data;
- comply with all grantor reporting requirements and with CCOG monitoring (both desk audit and on-site).

Expectations

<u>Roles and Responsibilities /</u>	CCOG	Contractor
Relationships with: <ul style="list-style-type: none"> • Contracting agencies • Governing Boards 	Y Y	N N
Responsible for: <ul style="list-style-type: none"> • Client Eligibility • Volunteer Driver Eligibility 	Y N	N Y
Owner of: <ul style="list-style-type: none"> • Scheduling and Dispatching Software • Owner of all data 	N Y	Y N
Focus on improving productivity: <ul style="list-style-type: none"> • Daily review of productivity of schedule • Daily validation of accurate data • Monthly meeting on quality of service 	N N Y	Y Y Y
Use state standards (may include any and all) <ul style="list-style-type: none"> • Data definitions • Reporting data 	Y Y	Y Y

III. PROJECT PROPOSAL

1. Proposals must include the following.

- Completed and signed Proposal Cover Sheet using the form in this RFP.
- Evidence of 501(c)(3) non-profit status (IRS designation letter).
- Narrative regarding:
 - Experience and professional qualifications of the firm (Financial strength, Paratransit experience), including:
 - Experience of local / regional support staff, (support services rendered)
 - Experience and qualities of the proposed contract management team
 - Anticipated approaches to providing the proposed services. (Technical Qualifications - to include Project Expectations)
- Annual Volunteer Transportation Services operational budget, showing grant-reimbursable and non-reimbursable revenues and expenses separately.
- References (organization name, contact person name, title, phone #, email address, and relevance to VTS proposal)

2. Narrative should describe in detail your organization's:

- a) Experience working with older adults and people with disabilities.
- b) Experience working with the aging and disability network.
- c) Experience following FTA and NCDOT grant requirements for record keeping and program operation include the methods by which you ensure efficiency and productivity in workflow and service delivery.
- d) Familiarity with transportation resources in the Centralina region.
- e) Manner in which you will accomplish compliance with applicable federal and state safety standards and regulations.
- f) Operational budget for the project including organizational chart, specific staff assignments and their qualifications.
 - a. Include wages, fringe and other direct or indirect expenses
 - b. Funding source to cover the volunteer mileage reimbursement (this is not a grant reimbursable cost)
- g) Approach to managing volunteer drivers
 - a. recruiting,
 - b. screening,
 - c. training and
 - d. retention of volunteer drivers
- h) Communication plan/ methods/ or schedule for both volunteer drivers and eligible clients
- i) Measures by which the services will be evaluated and the methods used to incorporate quality improvement into the service for both passenger and driver.
- j) Comprehensive, regional plan for outreach and marketing efforts.
- k) Transportation scheduling software and describe the capacity of the organization to handle trip scheduling and data collection and reporting.
- l) Insurance carrier and provide the monetary level of insurance coverage

FY18 VTS Proposal Cover Sheet

ORGANIZATION INFORMATION

Agency Name: _____

Physical Address: _____

Mailing address if different _____

Contact Person: _____

Phone: _____ Email: _____

EIN # _____

Attach the IRS letter of designation as a 501c3 with proposal.

- **Indicate affirmation of “responsible” offeror under the standards of 49 U.S.C. Section 5325 by authorized initials in this box.**

- **Indicate acceptance of CCOG contract form (RFP Appendix B) with or without requested changes, by authorized initials in the relevant box.**

Without changes

With requested changes as attached

- **Indicate acceptance of Federal and State Requirement and Special Conditions (RFP Appendix C) by authorized initials in this box.**

Authorized Signature _____ Date _____

Printed Name _____ Title _____

IV. Time Line, Selection Criteria, Submissions and Requirements

Timeline

<i>DATE</i>	<i>EVENT</i>
October 20, 2017	CCOG Issues this RFP
October 27, 2017	Submission of Written Questions. Vendors are permitted to submit written questions, but only for purposes of clarifying this RFP including questions about the proposed contract. All submissions shall be delivered or faxed to the Project Manager at the address and number listed under Format and shall include the name of a Vendor contact person to receive the answers. Questions are due by 5:00 PM . Questions received after this deadline may be answered at the discretion of this agency. All questions are to be submitted to Vicki Bott at vbott@centralina.org
November 3, 2017	Questions Answered
November 17, 2017	Proposal Submission. Complete proposals are due by 5:00 PM as described.
November 17 th to November 28 th , 2017	Evaluation. During this period, the Evaluation Committee will conduct a full detailed evaluation of Proposals and References.
November 29 th , 2017	Recommendation to CCOG and approval of contractor
November 30 – December 6, 2017	Finalization of the contract.
December 7 th , 2017	Contract fully executed. Effective date retroactive to July 1, 2017

Selection Criteria

This procurement will be conducted using competitive proposal procedures. It is the intent of the CCOG to conduct technical evaluations of proposals received, hold contractor interviews, conduct negotiations with one or more contractors, and select a contractor, with the goal of promoting fairness and competition. CCOG reserves the right to reject any or all proposals as provided in NC G.S. 143-129(b).

A Selection Committee representing the CCOG will assist with the selection process. CCOG shall award all competitive proposal contracts to the responsible firm whose proposal is most advantageous, considering price and technical requirements. The following criteria will be used to evaluate the proposals.

SCORING CRITERIA AND WEIGHT OF PROPOSAL COMPONENTS

Proposal Detail Questions	Criteria	Weight
1	Experience and professional qualifications of the firm (Financial strength, Para-transit experience), a) Experience of local / regional support staff, (support services rendered) b) Experience and qualities of the proposed contract management team c) References	25
2	Anticipated approaches to providing the proposed services. (Section III, part 2, a-l)	50
3	Operational Budget	20
4	Appendix – contract and forms	5

Submissions

Format of Submission of proposals

1. Include a Letter of Transmittal signed by the person(s) with the authority to bind your firm and answer questions or provide clarification concerning submitted proposals
2. Formatted Word Document that would print on 8 ½ “x 11” paper
3. Completely and accurately address the criteria found in this RFP
4. Submit only fully completed proposals. Incomplete proposals will not be accepted.
5. Delivered by 5:00 p.m. on November 17, 2017, to the attention of: Vicki Bott, Centralina Council of Governments, 9815 David Taylor, Suite 100, Charlotte, NC 28262; Or email to vbott@centralina.org.

All questions regarding the proposal process are to be submitted to Vicki Bott at vbott@centralina.org by 5:00 PM, October 27, 2017.

CCOG reserves the right to reject all proposals, and also reserves the right to award a contract based on “best value” as determined by its analysis of the tradeoffs of qualitative criteria and price as reflected in the proposed operational budget.

V. APPENDICES

These documents are provided in the following pages:

- A. CCOG VTS policy and procedures manual
- B. CCOG contract form for FY18 VTS services
- C. Federal and State Requirements and Special Conditions