**Jurisdiction, Agency or Company**

REQUEST FOR PROPOSAL (RFP)

Demand Response Call Center and Technology

FUNCTIONALITY FOR THE 21ST CENTURY

Jurisdiction, Agency or Company

1234 Warehouse Ln

City, SC 29803

Phone: 999-999-9999 | Fax: 999-999-9998

knorris@agency.info

**RFP ID: 20-001**

**Prepared By: Steve Yaffe**

**Date: April 6, 2020**

REQUEST FOR PROPOSAL

FUNCTIONALITY FOR THE 21ST CENTURY

Your Location

**RFP ID:** 20-001

**SUBMISSION DEADLINE:** May 15, 2020, 2:00 PM

**QUESTION SUBMISSION DEADLINE:** April 27, 2020

Questions may be submitted in written form no later than April 27, 2020 to:

|  |  |
| --- | --- |
| **RFP Contact Name:** | Monte Hall, CPM |
| **Contact Address:** | 1234 Warehouse Lane  City, South Carolina 29803 |
| **Telephone Number:** | 803-999-9999 |
| **Email Address:** | mhall@agency.info |

**INTRODUCTION**

Jurisdiction, Agency or Company invites and welcomes proposals for their Functionality for the 21st Century project. Based on your previous work experience, your firm has been selected to receive this RFP and is invited to submit a proposal. Please take the time to carefully read and become familiar with the proposal requirements. All proposals submitted for consideration must be received by the time as specified above under the "SUBMISSION DEADLINE."

*BIDDERS SHOULD NOTE THAT ANY AND ALL WORK INTENDED TO BE SUBCONTRACTED AS PART OF THE BID SUBMITTAL MUST BE ACCOMPANIED BY BACKGROUND MATERIALS AND REFERENCES FOR PROPOSED SUBCONTRACTOR(S) – NO EXCEPTIONS.*

**PROJECT AND LOCATION**

The bid proposal is being requested for Functionality for the 21st Century which is or shall be located at 1234 Warehouse Rd, City, South Carolina 29803.

**PROJECT MANAGER CONTACT INFORMATION**

The following individual(s) are the assigned contacts for the following:

For questions or information regarding All Inquiries, contact:

|  |  |
| --- | --- |
| **Name:** | Monte Hall, CPM |
| **Title:** | Purchasing Manager |
| **Phone:** | 803-999-9999 |
| **Fax:** | 803-999-9998 |
| **Email:** | mhall@agency.info |

**PROJECT OBJECTIVE**

The objective and ultimate goal for this project is (jurisdiction/agency/company) is a contractor to provide technology for and operate the (Jurisdiction/Agency Name) (acronym) para-transit call center. The para-transit operation, entitled (Name) (acronym), provides services that include day-to-day center operations scheduling, monitoring and tracking rides for consumers including individuals with physical, sensory and cognitive disabilities.

**PROJECT SCOPE AND SPECIFICATIONS**

(Service Name) provides demand-response transportation in

Service area location (Counties/Cities, portion of state) over a XXX square mile land area. The service area population in (year) was \_\_\_\_\_, with (description of demographics). Discussion of cellular reception across the service area. Description of topography (urban canyons, valleys, high points).

(Service Name) provides (description of the transportation services offered). (Service Name) is a function of (Agency governance). The project officer overseeing (Service Name) is (job title), within the (Office or Dept Name).

Rides are provided by (names of ride providers). A list of vehicles including the ride provider, seating capacity and service area or service span (if not the same as (service name)) is provided in Attachment/Exhibit \_.

Service Characteristics of (Service Name):

* Peak Bus Requirement:     , including (# vehicles by type and capacity (i.e. 30’ transit buses; body-on-chassis with 12 seats and 2 wc-positions, accessible minivans; sedans)
* Weekday Service Span (first pickup time, last drop-off time); Saturday service span and Sunday service span, if applicable
* Ride Requests currently can be booked (Call Center service hours) by (phone, text, websites)
* Passenger Assistance is provided on a (double-click to choose one)
* Annual passenger boardings:
* Annual service hours:
* Annual service miles:
* Annual Operating Cost:
* Farebox Recovery (fares and customer agency payments):

Ride requests are accepted  in advance and provided by (dedicated contractors or Agency Name and proportion of rides provided) and (non-dedicated vendors and proportion of rides provided). Rides are dispatched using (choose one) .

Average scheduling productivity on dedicated vehicles is       per vehicle service hour.

The following agencies purchase rides for their clients:

Paragraph for each agency showing agency name, number of annual rides, trip purposes and rider characteristics (disabilities, age, etc.). Any special directions pertinent only to that agency?

Discussion of fare policies (which may vary by sponsoring agency).

Projections for Growth (if any) in the service area, span of service and ridership.

Background information including the vehicle inventory, last annual report and sample monthly reports are attached in

Appendix or Exhibit \_

II. INFORMATION FOR OFFERORS   
All communications regarding this procurement must be through the project procurement officer,

Name, title, telephone and email

When emailing the project procurement officer, please place the RFP number in the subject line.

III. SCOPE OF SERVICES

(Project Name) provides rides (Service Span Weekdays, Saturdays, and Sundays/Holidays). The Contractor is expected to provide technology to enable rides to be booked or cancelled by telephone during (Service Span Weekdays, Saturdays, and Sundays/Holidays).

The technology shall also enable clients, caregivers and service sites or offices designated by the client to book or cancel rides by (Internet and app and, outside office hours, by Interactive Voice Response (IVR) technology).

The Contractor is to describe procedures, including communications and technology features, that preserve the privacy of riders and prevent clients from arranging rides directly with drivers. Proposals shall acknowledge that client and trip data are the property of (jurisdiction).

(Jurisdiction) expects that Contractor personnel and clients maintain a cordial relationship and that personnel be responsive to rider needs. The (service name) customer rights and responsibilities document is included as (attachment/exhibit #). (The Contractor shall provide or the (jurisdiction) is providing) technology to record each customer comment. The purpose of customer comment technology is to record the comment, add text boxes to record Contractor or provider notes as well as a Comment Resolution text box, assign an issue type category to that comment, assign a provider and driver number, provide a date for each incident, assign the comment to a particular job title, and assign a due date for an initial report and final disposition of the comment investigation. The technology (has/shall have) the ability to download comments in a spreadsheet sorted by any data field. (Jurisdiction-provided customer comment technology is described in Attachment/Exhibit \_). The proposal shall describe how the customer comment technology shall be structured and deployed. Comments regarding system policies shall be directed to the (jurisdiction) Project Manager. The (jurisdiction project manager and personnel as assigned) shall have access to each comment in the database and be solely responsible for closing customer comments.

The (jurisdiction) requires that

List Website, App and Telephonics Requirements  
\*Functionalities  
\*Accessibility  
\*Limited English Proficiency

\*Calls be answered within \_\_ seconds

Communications between the Contractor and service providers shall be

(description)

Facility Description

(Jurisdiction) will provide for use by the Contractor in fulfilling tasks of this contract. This facility will be open (Service Span Weekdays, Saturdays, and Sundays/Holidays) to take inquiries from (project name) customers.

The Contractor is expected to observe the following requirements regarding staffing.

Key Personnel must be approved by the (jurisdiction) project manager. The key positions are:

(Title)

(Expectations)

(Qualifications)

(Title)

(Expectations)

(Qualifications)

Subcontractors must be approved by the (jurisdiction) project manager. The proposal must list the role each subcontractor is to play and provide contact information, a summary of relevant experience and a reference. The proposal must also indicate to which position each subcontractor is to report. (The jurisdiction) bears no financial or contractual responsibility for the Contractor’s subcontractors or suppliers.

(Project Name) requires that the contractor provide (days and hours of operation). The Contractor must adhere to (the jurisdiction’s) minimum requirements for vetting personnel used on (name of project). (The jurisdiction’s) Project Manager may, based on documented complaints, direct the Contractor’s project manager to remove an employee from (name of project).

Job Title  
Vetting and Training minimum requirements

Job Title  
Vetting and Training minimum requirements

Staffing Structure

Proposals must provide an organization chart with lines of responsibility and numbers of personnel in each position in response to this proposal. This chart should also indicate which position is the prime point of contact for (jurisdiction Project Manager) by day of week and time period. Proposals must also state the Contractor’s requirements for Office space and equipment not provided by the (jurisdiction).

Quality Assurance

Proposals must include a description of the Contractor’s procedures to monitor the quality of (service name) service provided including transportation provider performance. The Contractor shall provide the (jurisdiction) Project Manager with an electronic copy of standard operating procedures and manuals as well as training curricula (45) days after contract award.

Incident Management Procedures

The Contractor shall notify the (jurisdiction) project manager of incidents including collisions and injuries as per the (service name) (Public Transportation Agency Safety Plan (PTASP) or (similar document for non-public transit organizations) as shown in (Attachment/Exhibit \_). The proposal shall discuss how the PTASP shall be implemented by the Contractor.

Emergency Conditions Procedures

The (jurisdiction) may require use of (service name) capacity in cases of emergency, both on an immediate need basis to include evacuating residents of a damaged building and in major regional incidents (force majeure). In such situations, the (jurisdiction) chief emergency officer or designee shall contact both the (jurisdiction) project manager and Contractor project manager to request assistance.

Invoicing and Reporting  
Monthly invoices with the reports listed below are due by the (10th) of the following month. Invoices shall be paid (, after assessing any incentives or liquidated damages/penalties) on a (net-30 day) basis.

Invoice Format

List of required monthly reports with brief descriptions

On-going meeting schedule with the project officer and oversight committees

Performance Standards, Incentives and Liquidated Damages/Penalties

(varies by state procurement regulations)

The following performance standards apply to Contractor and or to ride providers

\*Minimum or maximum performance targets for each function (e.g. scheduling productivity, ride-time)  
\*Procedures to claim incentives  
\*Procedures to assess liquidated damages

Optional Services shall include:

**SCHEDULED TIMELINE**

The following timeline has been established to ensure that our project objective is achieved; however, the following project timeline shall be subject to change when deemed necessary by management.

|  |  |
| --- | --- |
| **MILESTONE** | **DATE** |
| |  |  | | --- | --- | | **Preproposal Conference (recommended but not mandatory)** |  |  |  |  | | --- | --- | | **Question Deadline Date:** |  |  |  |  | | --- | --- | | **Amendment 1 Issuance Date:** |  |  |  |  | | --- | --- | | **Proposal Due Date:** |  |   **Notice to Proceed to include Memorandum of Negotiations:** | April 22, 2020  April 29, 2020  May 13, 2020  June 3, 2020  July 1, 2020 |

|  |  |
| --- | --- |
| **Vetting of Technology Requirements with Stakeholders:**  **Provision of Standard Operating Procedures and Manuals** | July 17, 2020  September 1, 2020 |

|  |  |
| --- | --- |
| **Initial Testing of Technology with FY20 Ride Data Completed:** | August 1, 2020 |

|  |  |
| --- | --- |
| **Staff Training and Rider/Caregiver Engagement Begins:** | August 19, 2020 |

|  |  |
| --- | --- |
| **Full Deployment:** | August 31, 2020 |

**PROPOSAL BIDDING REQUIREMENTS**

**PROJECT PROPOSAL EXPECTATIONS**

Jurisdiction, Agency or Company shall award the contract to the proposal that best accommodates the various project requirements. Jurisdiction, Agency Or Company reserves the right to award any contract prior to the proposal deadline stated within the "Scheduled Timeline" or prior to the receipt of all proposals, award the contract to more than one Bidder, and refuse any proposal or contract without obligation to either Jurisdiction, Agency Or Company or to any Bidder offering or submitting a proposal.

**DEADLINE TO SUBMIT PROPOSAL**

All proposals must be received by Jurisdiction, Agency or Company no later than 2:00 PM on June 3, 2020 for consideration in the project proposal selection process.

**PROPOSAL SELECTION CRITERIA**

Only those proposals received by the stated deadline will be considered. All proposals, submitted by the deadline, will be reviewed and evaluated based upon information provided in the submitted proposal. In addition, consideration will be given to cost and performance projections. Furthermore, the following criteria will be given considerable weight in the proposal selection process:

* Proposals received by the stipulated deadline must be in the correct format.
* Bidder's alleged performance effectiveness of their proposal's solution regarding the Project Objective of Jurisdiction, Agency Or Company.
* Bidder's performance history and alleged ability to timely deliver proposed services.
* Bidder's ability to provide and deliver qualified personnel having the knowledge and skills required to effectively and efficiently execute proposed services.
* Overall cost effectiveness of the proposal.

Jurisdiction, Agency Or Company shall reserve the right to cancel, suspend, and/or discontinue any proposal at any time they deem necessary or fit without obligation or notice to the proposing bidder/contractor.

**PROPOSAL SUBMISSION FORMAT**

The following is a list of information that the Bidder should include in their proposal submission:

**Summary of Bidder Background**

* Bidder's Name(s)
* Bidder's Address
* Bidder's Contact Information (and preferred method of communication)
* Legal Form of Bidder (e.g. sole proprietor, partnership, corporation)
* Date Bidder's Company Formed
* Description of Bidder's company in terms of size, range and types of services offered and clientele.
* Bidder's principal officers (e.g. President, Chairman, Vice President(s), Secretary, Chief Operating Officer, Chief Financial Officer, General Managers) and length of time each officer has performed in his/her field of expertise.
* Bidder's Federal Employee Identification Number (FEIN)
* Evidence of legal authority to conduct business in South Carolina (e.g. business

license number).

* Evidence of established track record for providing services and/or deliverables that are the

subject of this proposal.

* Organization chart showing key personnel that would provide services to Jurisdiction, Agency Or Company

**Financial Information**

* Provide a copy of the most recent audited financial statement, or an annual report by a certified public accountant.
* State whether the Bidder or its parent company (if any) has ever filed for bankruptcy or any form of Reorganization under the Bankruptcy Code.
* State whether the Bidder or its parent company (if any) has ever received any sanctions or is currently under investigation by any regulatory or governmental body.

**Proposed Outcome**

* Summary of timeline and work to be completed.

**Equipment or Service**

* List any and all equipment or services required for this proposed project and the number of each.
* Detailed estimated cost for each piece of equipment or service.
* List any or equipment or services required of a subcontractor, along with a brief explanation.

**Cost Proposal Summary and Breakdown**

* A detailed list of any and all expected costs or expenses related to the

proposed project.

* Summary and explanation of any other contributing expenses to the total cost.
* Brief summary of the total cost of the proposal.

**Insurance**

* Details of any liability or other insurance provided with regard to the staff or project.

**References**

* Provide 3 references

Bidder agrees that Jurisdiction, Agency or Company may contact all submitted references to obtain any and all information regarding Bidder's performance.