



November 25, 2019

To: Members of the Board of Directors
From: Darrell E. Johnson, Chief Executive Officer
Subject: Approval to Release Request for Proposals for OC ACCESS Eligibility Determination Services

Overview

The Orange County Transportation Authority contracts for the provision of Americans with Disabilities Act OC ACCESS eligibility determination services. The contract for these services will expire on June 30, 2020. A draft request for proposals has been developed to initiate a competitive procurement process to select a contractor. Staff is requesting Board of Directors' approval to release a request for proposals for OC ACCESS eligibility determination services.

Recommendations

- A. Approve the proposed evaluation criteria and weightings for Request for Proposals 9-1621 to provide OC ACCESS eligibility determination services.
- B. Approve the release of Request for Proposals 9-1621 to select a firm to provide OC ACCESS eligibility determination services for a three-year initial term, with a two-year option term.

Discussion

Section 223 of the Americans with Disabilities Act (ADA) requires that public entities operating fixed-route transit services also provide complementary paratransit services for individuals unable to use the fixed-route service. The regulations issued by the United States Department of Transportation specify to whom and under what circumstances complementary paratransit service is to be provided. In addition, the regulations require that providers of ADA complementary paratransit services develop and administer an eligibility process to determine whether individuals who request the service meet the regulatory criteria for eligibility.

All individuals who apply for ADA certification are required to participate in an in-person functional assessment. This evaluates physical and/or cognitive disabilities that may prevent an individual from using fixed-route bus services. A total of 30,649 applications requesting eligibility have been received since initiating the current contract in July 2016. The functional assessments have been an effective tool in conducting a fair and equitable assessment of individuals applying for paratransit service. Upon learning more about the eligibility process, including the required in-person assessment, many applicants realize they will not qualify for ADA certification and elect to opt out of the process. As a result, 44 percent of the 30,649 applicants who submitted requests for eligibility since July 2016, did not complete the eligibility process.

Currently, there are 32,703 individuals eligible to use OC ACCESS, of which approximately 5,130 are active riders, using the service for at least four trips per month. All individuals with ADA certification must be re-evaluated every five years. In an effort to improve the customer experience and reduce costs, Orange County Transportation Authority (OCTA) staff implemented an automatic renewal procedure that identifies individuals whose eligibility determination is not expected to change. Prior to eligibility expiration, these individuals are contacted to review and update their information for renewal and, in some cases, the need for another in-person assessment is eliminated.

The OC ACCESS eligibility determination program currently processes an average of 490 assessments each month (Attachment A). Of these, approximately 65 percent are new customers and 35 percent are for ADA eligibility renewals.

The current OC ACCESS eligibility contract is set to expire June 2020. In order to provide seamless ADA eligibility determination services, a new contract must be procured.

Procurement Approach

OCTA's Board of Directors (Board)-approved procurement policies and procedures require that the Board approve all requests for proposals (RFP) over \$1,000,000, as well as approve the evaluation criteria and weightings. Staff is submitting for Board approval the draft RFP and evaluation criteria and weightings, which will be used to evaluate proposals received in response to the RFP.

The proposed evaluation criteria and weightings are as follows:

- | | |
|-------------------------------------|------------|
| • Qualifications of the Firm | 20 percent |
| • Staffing and Project Organization | 30 percent |
| • Work Plan | 30 percent |
| • Cost and Price | 20 percent |

Several factors were considered in developing the criteria weightings. Staff proposes assigning the greatest level of importance to staffing and project organization and the work plan. The proposed project staff must be knowledgeable in ADA paratransit rules, regulations, and the eligibility process required to determine whether individuals meet the regulatory criteria for service eligibility. The work plan must identify how the firm will recruit, hire, train, and employ the various specialists who have experience working alongside persons with disabilities, with a focus on the relevant complexities performing the functional assessment criteria identifying ADA eligibility. Qualifications of the firm must include a proven history of the firm in successfully completing similar cognitive and physical evaluation projects. Cost is also a critical element to ensure services are received at a fair cost.

The contract for this procurement will be for a three-year initial term, with a two-year option term, and one, one-year second option term. The total budget for the initial term is anticipated to be approximately \$2,430,000.

This RFP will be released upon Board approval of these recommendations.

Fiscal Impact

The project was approved in the OCTA Fiscal Year 2019-20 Budget, Operations Division, Contract Transportation Services Department, Account 2147-7519-D1208-8T7, and is funded through the Local Transportation Fund.

Summary

Board approval is requested to release RFP 9-1621 for OC ACCESS eligibility determination services and approval of the proposed evaluation criteria and weightings.

Attachments

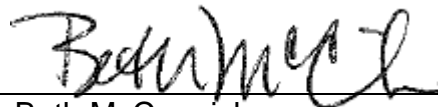
- A. OC ACCESS Eligibility Assessment Summary
- B. Draft Request for Proposals (RFP) 9-1621, OC ACCESS Eligibility Determination Services

Prepared by:



Gracie A. Davis
Section Manager, Paratransit
Services
714-560-5641

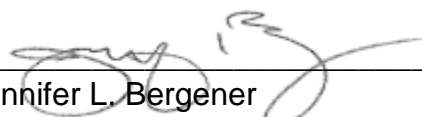
Approved by:



Beth McCormick
General Manager, Operations
714-560-5964



Virginia Abadessa
Director, Contracts Administration and
Materials Management
714-560-5623



Jennifer L. Bergener
Chief Operating Officer, Operations
714-560-5462