



April 9, 2020

To: Transit Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Consultant Selection for OC ACCESS Eligibility Determination Services

Overview

The Orange County Transportation Authority is required to provide an eligibility determination process for Americans with Disabilities Act complementary paratransit services. On November 25, 2019, the Board of Directors authorized the release of a request for proposals. Offers were received in accordance with the Orange County Transportation Authority procurement procedures for professional and technical services. Board of Directors' approval is requested to select a contractor to provide these services.

Recommendations

- A. Approve the selection of Medical Transportation Management, Inc., as the firm to provide OC ACCESS eligibility determination services.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-9-1621 between the Orange County Transportation Authority and Medical Transportation Management, Inc., in the amount of \$3,062,866, for a three-year initial term from July 1, 2020 through June 30, 2023, with one, two-year option term, to provide OC ACCESS eligibility determination services.

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 who are unable to use the fixed-route service. The regulations issued by the United States Department of Transportation specify to whom, and under what circumstances, service is to be provided. In addition, the regulations require that public providers of 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 OC ACCESS ADA eligibility certification are required to participate in an in-person functional assessment. This assessment evaluates physical and/or cognitive disabilities that may prevent an individual from using fixed-route bus services. Conducting an in-person assessment provides an opportunity to better determine an individual's eligibility for services based on ADA guidelines. OCTA utilizes a contractor to perform all in-person functional assessments, and the current contract will expire June 30, 2020.

Currently, 32,645 individuals are eligible to use OC ACCESS. The OC ACCESS program receives an average of 470 applications each month. Of these, approximately 62 percent are new customers and 38 percent are existing customers requiring recertification. All OC ACCESS eligible customers must be evaluated at least once every five years.

Procurement Approach

This procurement was handled in accordance with OCTA Board of Directors (Board)-approved procedures for professional and technical services. Various factors are considered in the award for professional and technical services. Award is recommended to the firm offering the most comprehensive overall proposal considering such factors as prior experience with similar projects, staffing and project organization, work plan, as well as cost and price.

On November 25, 2019, the Board authorized the release of Request for Proposals (RFP) 9-1621 to select a firm to provide OC ACCESS eligibility assessment determination services. On November 26, 2019, RFP 9-1621 was issued electronically on CAMM NET. The project was advertised in a newspaper of general circulation on November 26 and December 5, 2019. A pre-proposal conference was held on December 18, 2019, with six attendees representing three firms. Two addenda were issued to provide a copy of the pre-proposal conference registration sheet and respond to questions related to the RFP.

On February 4, 2020, three proposals were received. An evaluation committee consisting of OCTA staff from Contracts Administration and Materials Management, Paratransit Services, Scheduling and Bus Operations Support departments, as well as external representatives from Los Angeles County Metropolitan Transportation Authority and OmniTrans met to review all submitted proposals.

The proposals were evaluated based on the following Board-approved evaluation criteria and weights:

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|-------------------------------------|------------|
| • 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. Staffing and project organization, as well as work plan were assigned the greatest level of importance. The proposed project staff needed to demonstrate knowledge of ADA paratransit rules, regulations, and the eligibility process required to determine whether individuals meet the regulatory criteria for service eligibility. The work plan proposed by the firms needed to identify how the firm will recruit, hire, train, and employ the various specialists with experience working alongside persons with disabilities, with a focus on the relevant complexities performing the functional assessment criteria for identifying ADA eligibility. Qualifications of the firm needed to demonstrate a proven track record of the firm successfully completing similar cognitive and physical evaluation projects. Cost and price was also a critical element to ensure services are received at a fair cost.

On February 13, 2020, the evaluation committee reviewed all proposals based on the evaluation criteria, and all firms listed below in alphabetical order were invited to the interview:

C.A.R.E. Evaluators, Inc. (CARE)
Aliso Viejo, California

Medical Transportation Management, Inc. (MTM)
St. Louis, Missouri

Mobility Management Partners, Inc. (MMP)
Camarillo, California

On February 20, 2020, the evaluation committee conducted interviews with all firms. During the interview, each firm had the opportunity to present its approach for accomplishing the requested services, project team qualifications, and respond to evaluation committee questions. Firms were asked to share some of the potential challenges to the ADA eligibility process and lessons learned through previous experience in providing paratransit evaluations, as well as their quality assurance practices for meeting the 21-day application processing period as required in the ADA guidelines. All firms also answered

specific questions to each firm's proposal relative to OCTA's requirements specified in the scope of work.

On February 20, 2020, after the interviews, a request for a best and final offer (BAFO) was sent to all firms. The BAFO requested each proposer to provide a cost breakdown of the cost per functional assessment based on an estimated number of assessments identified by OCTA.

After considering the responses to the questions asked during the interviews and BAFO information, the evaluation committee reconvened and adjusted the individual criteria scores of all firms. As a result, the overall ranking of the firms remained unchanged.

Based on the evaluation of the written proposals, responses from the interviews, and BAFO information, the evaluation committee is recommending MTM for consideration of the award. The following is a brief summary of the proposal evaluation results.

Qualifications of the Firm

All three firms are established companies with relevant experience in ADA paratransit eligibility determination services.

MTM has provided transportation management services to individuals with disabilities, elderly, and the transportation disadvantaged across the country for over 25 years. It currently operates 14 ADA eligibility assessment programs across the country and has several business offices in Southern California. MTM's customers include Chicago Regional Transportation Authority, LA Access Services, Inc., San Diego Metropolitan Transit System, Valley Metro Regional Transportation Authority (Valley Metro), and Washington Metropolitan Area Transit Authority. MTM's ADA paratransit experience consists of conducting in-person interviews, various physical and telephone assessments, as well as cognitive and functional assessments. MTM has identified an assessment site that is close to OCTA and has a draft blueprint ready to develop indoor courses to meet the requirement specified in the scope of work. MTM included in their proposal and confirmed during the interview that they will have the construction of an assessment facility complete prior to the start of the project to ensure a smooth project transition.

MMP has been in business since 2009 in providing relevant services to residents in the City of Los Angeles and Los Angeles County. MMP specializes in mobility training workshops, travel training, and mobility management. MMP's customers include the City of Los Angeles, LA Access Services, Inc.,

Ventura County Catch-A-Ride, and Ventura County Transportation Commission (VCTC). MMP's experience with ADA paratransit eligibility assessment is mainly with VCTC, where MMP provides services to ten individual cities serviced by seven different transit operators. In its proposal, MMP displayed its comprehensive project experience in receiving and processing applications for paratransit eligibility, as well as conducting transit assessments. During the interview, MMP verified that it has not yet identified a suitable assessment facility to meet the needs of this project.

CARE has over 25 years of experience providing ADA paratransit eligibility assessment services to multiple large transit agencies in the past, such as LA Access Services, Inc. and Valley Metro. CARE demonstrated its knowledge and ADA paratransit eligibility certification experience in paratransit evaluation, travel training, call center operation, appeals, mobility management, and rider safety training. CARE's current customers include City of Santa Rosa, SamTrans in San Mateo, and Solano Transportation Authority. CARE is the incumbent firm providing eligibility determination services to OCTA. CARE has identified an assessment site for the paratransit evaluation office that is in close proximity to OCTA.

Staffing and Project Organization

MTM proposed a team with project experience in paratransit eligibility assessment and travel training in the western region of the United States. MTM's proposed project manager has over seven years of relevant project experience as a transit evaluator and quality assurance manager, as well as in recruitment, selection, hiring and training staff. MTM's proposed project manager will be 100 percent dedicated to the OCTA project. In addition to the project manager, MTM also proposed one full-time lead mobility assessment evaluator (MAE), three full-time MAEs for conducting interviews, physical and cognitive assessments, as well as three customer care representatives who will be solely dedicated to the OCTA project and located at the same proposed facility as the assessments to ensure consistent communication among staff.

During the interview, MTM presented a team that demonstrated knowledge and expertise in successfully transitioning similar projects to various transit agencies. MTM also confirmed during the interview that it will provide a level of executive support on-site during start-up to ensure the successful execution of this project on time.

MMP proposed an experienced team with a high level of competence in performing eligibility assessments as required in the scope of work. The firm proposed to utilize a project administrator with over 40 years of experience in

transportation to oversee database design and maintenance, as well as data connections for the OCTA project. Furthermore, the proposed project director has over seven years of experience in ADA eligibility assessment and will oversee all operational aspects of the project. The firm's proposed project team includes experienced individuals identified to perform the assessments, as well as customer service. However, MMP did not identify a project manager in their proposal.

During the interview, MMP confirmed and shared its plans and challenges regarding recruiting and hiring a project manager for OCTA's project. MMP's proposed plan will be to have MMP's proposed project administrator and director both serve as co-interim project managers until such time as a suitable permanent project manager is hired.

CARE proposed a project team with relevant project experience. CARE's proposed staff includes its Chief Executive Officer (CEO), who is a leader in providing paratransit eligibility services, travel training, and mobility management. CARE's CEO will function as the contract manager for the OCTA project. CARE's proposed project manager has experience in medical and surgical services and less than one-year experience in the ADA paratransit eligibility assessment services. CARE also proposed three full-time evaluators and four full-time customer service representatives. CARE's proposed project team demonstrated a full comprehension of the project's requirements during the interview.

Work Plan

MTM's work plan demonstrated knowledge and understanding of each task specified in the scope of work, such as providing details from phone inquiries and scheduling, to in-person interview processes, and cognitive and physical functional assessments, utilizing the Mini Mental State Examination and the Functional Assessment of Cognitive Transit Skills. These assessments are in-depth tests that assess an individual's diagnosis to independently use fixed-route services. In addition to a comprehensive assessment process, MTM's proposal also included data security, record retention and reporting, as well as quality assurance and performance monitoring to meet performance standards. MTM's proposal includes a complete implementation and transition plan which identifies and assigns every task to a specific team member, from recruiting and training staff to occupying and outfitting the new facility, including a complete start-up schedule.

MMP's work plan demonstrated an understanding of OCTA's requirements, such as the elements of ADA eligibility application processing, including a

detailed description on scheduling, in-person interviews and protocol, as well as cognitive and physical functional assessments. MMP's proposal also presented a proprietary documentation and reporting database system which is designed to manage the project with consistency in tracking training activities and capturing assessment program data for each individual participant. MMP's implementation and transition plan includes timelines and identifies potential risks to complete all necessary activities leading up to the start of service.

CARE provided a work plan that addressed elements in the scope of work. In the proposal, CARE described the steps for the paratransit eligibility determination process, scheduling appointments and geocoding, in-person evaluation, and functional testing, as well as quality review and control processes. CARE proposed a custom-designed software program, Access Services Management System, to perform in-person functional assessments and to manage applicant and reporting information, which allows for comprehensive assessments for various disabilities and functional issues when using public transit.

Cost and Price

The firms were asked to propose a total start-up price and a unit price per individual assessment completed based on 6,000 assessments yearly for the initial and option terms. Pricing scores were based on a formula, which assigned the highest score to the lowest total pricing and scored the other proposals total pricing based on their relation to the lowest total pricing. MTM proposed the lowest unit price per individual assessment completed.

Procurement Summary

Based on the evaluation of the written proposals, the firm's qualifications, as well as the information obtained from the interviews and BAFO, the evaluation committee recommends the selection of MTM as the firm to provide OC ACCESS eligibility determination services.

Fiscal Impact

This project will be included in the proposed OCTA Fiscal Year 2020-21 Budget, Operations Division, Paratransit Services, Account 2147-D1208-8T7, and will be funded through the Local Transportation Fund.

Summary

Based on the information provided, staff recommends the Board authorize the CEO to negotiate and execute Agreement No. C-9-1621, between OCTA and MTM, in the amount of \$3,062,866, to provide OC ACCESS eligibility determination services for a three-year initial term, from July 1, 2020 through June 30, 2023, with one, two-year option term.

Attachments

- A. Review of Proposals, RFP 9-1621 OC ACCESS Eligibility Determination Services
- B. Proposal Evaluation Criteria Matrix, RFP 9-1621 OC ACCESS Eligibility Determination Services
- C. Contract History for the Past Two Years, RFP 9-1621 OC ACCESS Eligibility Determination Services

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