



**July 11, 2019**

**To:** Transit Committee

**From:** Darrell E. Johnson, Chief Executive Officer

**Subject:** Agreement for Mobility Management Services

### **Overview**

The Orange County Transportation Authority's Mobility Management Program offers travel training to OC ACCESS riders, seniors, and persons with disabilities to teach the skills and gain the familiarity needed to travel safely and independently on the fixed-route bus system. The Mobility Management Program is a free service that provides information on the different mobility resources available in Orange County and educates seniors and persons with disabilities about using public transportation to enhance their independence through greater mobility options. The current agreement for the provision of travel training services will expire on July 31, 2019. Approval by the Board of Directors is requested to select a contractor to continue to provide travel training as part of the Mobility Management Program.

### **Recommendations**

- A. Approve the selection of Mobility Management Partners, Inc., as the firm to provide mobility management services.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-9-1244 between the Orange County Transportation Authority and Mobility Management Partners, Inc., in the amount of \$248,911, for a one-year initial term, with one, two-year option term, to provide mobility management services.

### **Discussion**

On January 11, 2016, the Orange County Transportation Authority (OCTA) Board of Directors (Board) authorized staff to apply for Federal Transit Administration (FTA) Section 5310 grant funding to develop a comprehensive Mobility Management Program for Orange County. In April 2017, OCTA received a Section 5310 grant agreement from the State of California

Department of Transportation, as the designated recipient of FTA Section 5310 funds, to implement a countywide Mobility Management Program consisting of a specialized transportation services information and referral project and a travel training program. The information and referral project was completed in July 2018 with the development of the *Orange County Referral Guide for Specialized Transportation*, which provides information on a variety of specialized transportation options available to seniors and persons with disabilities in Orange County. The guide is available for review on the OCTA website under the Mobility Management Program page, along with information on OCTA's Travel Training program. The OCTA website also provides information and links to 211RIDE.org as a collaborative partner and additional source for countywide transportation information.

The OCTA Travel Training program, implemented in July 2017, teaches the practical skills needed to safely and independently navigate the fixed-route bus system. The hands-on training sessions are available to individuals and groups, and include trip planning, vehicle boarding, fare payment, and trip transfers. While the curriculum is standardized, a training plan is developed and customized for each individual to address their specific mobility and travel needs. The goal of travel training is to remove any perceived barriers and to gain familiarity in using fixed-route public transit for passengers with specialized needs, including OC ACCESS riders. The travel training program will also help manage the growing demand for OC ACCESS service by encouraging OC ACCESS riders to use fixed route for one, some, or all of their transportation needs, rather than rely on OC ACCESS alone. For those who do not qualify for OC ACCESS service but do not have access to personal transportation, travel training may be the encouragement needed to connect those individuals with other mobility choices.

Since its launch in July 2017, a total of 49 travel training workshops have been conducted throughout the County, providing group training for more than 1,010 participants. The workshops were conducted with individuals from high schools, senior centers, senior living facilities, adult day centers, and other social services centers. Several participants from these workshops were then referred for one-on-one or small group follow-up training. In addition, outreach was conducted at local community centers and referrals were received through the OC ACCESS eligibility determination process specifically for individuals with a restricted eligibility and for individuals who did not qualify for OC ACCESS service but would benefit from personalized, fixed-route travel training. As a result of the workshops, outreach, and eligibility referrals, the program has conducted 152 individual travel training sessions.

The current travel training program is provided by a contractor through an agreement that will expire on July 31, 2019. In order to continue the mobility management services, specifically for travel training services, a procurement was initiated in April 2019.

### ***Procurement Approach***

This procurement was handled in accordance with OCTA 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 April 16, 2019, RFP 9-1244 was issued electronically on CAMM NET. The project was advertised in a newspaper of general circulation on April 16 and 22, 2019. A pre-proposal conference was held on April 22, 2019, with two attendees representing two firms. One addendum was issued to provide a copy of the pre-proposal conference registration sheet and respond to questions related to the RFP.

On May 6, 2019, two proposals were received. An evaluation committee consisting of OCTA staff from Contracts Administration and Materials Management, Contract Transportation Services, and Motorist Services departments met to review both proposals. The proposals were evaluated based on the following evaluation criteria and weights:

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

Several factors were considered in developing the evaluation criteria weights. Qualifications of the firm is an important component since the firm must be able to show a strong history of training projects in mobility management and working with Americans with Disabilities (ADA) customers. The firm must provide a work plan that demonstrates knowledge regarding customizing training for seniors and persons with disabilities that will successfully result in encouraging independence and use of the fixed-route system. Staffing and project organization was assigned 20 percent to ensure the proposed staff are experienced in mobility training workshops and travel training services. Cost was also weighted at 20 percent to ensure the competitiveness in pricing to accomplish each task.

On May 14, 2019, the evaluation committee reviewed the two proposals based on the evaluation criteria and both firms listed below, in alphabetical order, were invited to the interview:

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

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

On May 20, 2019, the evaluation committee conducted interviews with both firms. Each firm had the opportunity to present its approach for accomplishing the requested services, project team qualifications, and respond to evaluation committee questions. During the interview, each firm described its understanding of tasks involved in this project and was asked to share statistics that support the decrease in use of paratransit service, as well as lessons learned through previous and current experience with mobility management related services. Both firms also answered specific questions to each firm's proposal relative to OCTA's requirements specified in the scope of work.

After considering the responses to questions asked during interviews, the evaluation committee made adjustments to the preliminary scores. The ranking of the firms remained unchanged.

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

#### Qualifications of the Firm

Both firms are established companies with experience in providing mobility management services.

MMP specializes in mobility training workshops, travel trainings, and ADA paratransit eligibility assessments, with customers throughout California. MMP currently provides similar services for Access services in Los Angeles County, Los Angeles County Metropolitan Transportation Authority, Ventura County Catch-A-Ride, and Ventura County Transportation Commission. In addition, MMP is the incumbent firm providing mobility management services to OCTA. The firm participates in various organizations, such as the Association of Travel Instructions (ATI), the California Association for Coordinated Transportation, the California Association of Orientation and Mobility Specialists, the Consortium for the Educational Advancement of Travel Instruction, and Easter Seals Project

Action (ESPA), from which MMP developed its customized community travel training curriculum with reliable and proven foundation. MMP also attends and presents regularly at various local community organizations to meet the challenge of increasing public awareness and generating viable referrals, resulting in a higher number of evaluations and trainings.

MTM demonstrated competence in providing transportation management services across the country. MTM's customers include Jacksonville Transportation Authority, Regional Transportation Authority, San Diego Metropolitan Transit System, Valley Metro Regional Transportation Authority, and Washington Metropolitan Area Transit Authority. MTM uses the standards and methodologies of national organizations, such as ATI, ESPA, and National Transit Institute to develop its training curriculum. MTM regularly hosts free travel training and assessment webinars to address topics of common challenges in travel training.

#### Staffing and Project Organization

MMP's proposed staffing includes a project management model that shares responsibilities between its two top management executives to provide a strong support system to both field and administrative staff. The proposed project director has over 40 years of experience related to transit operations in developing, enhancing, and implementing the training curriculum. The proposed project director will serve in a backup capacity to the proposed project manager as needed. The proposed project manager has 13 years of experience in certified personal training and three years in ADA eligibility assessment, which includes designing and successfully implementing an interview model creating a more streamlined and user-friendly process. The proposed project supervisor has over seven years as a travel instructor for MMP. MMP also proposed two transportation mobility specialists and one mobility coordinator in its project team.

MTM's proposed project team includes one project manager and one to-be-hired full-time mobility trainer. The proposed project manager has two years of experience as a mobility assessment evaluator for ADA paratransit eligibility assessment. In its proposal, MTM indicated trainers who work at the firm's offices in San Diego, California and Phoenix, Arizona, would be available to travel to Orange County to assist and/or fill in during an employee absence, if necessary.

### Work Plan

MMP's proposal demonstrated knowledge and understanding of each task specified in the RFP, including details on customized workshop curriculums based on geographic and linguistic demography of locations, age groups, and specific abilities of the participants, as well as multiple models and sizes of travel training uniquely designed to address a variety of needs. In addition to a comprehensive travel training process and safety procedure, MMP's proposal also included a proprietary database system which was designed to manage the project with consistency in tracking training activities, capturing all mobility management program data for each individual participant. MMP's workshop materials are customized for individual attendees at each workshop and all staff time and additional resources that are required to design and produce these customized materials are included in the proposed cost proposal. MMP also proposed a strong referral system, utilizing a wide variety of resources to generate referrals with multi-faceted outreach efforts, such as "outreach sweeps," which are incorporated as a daily routine for MMP's staff to visit facilities and promote both group and individual training programs.

MTM's work plan demonstrated an understanding of OCTA's requirements. The work plan includes the elements of designing mobility training workshops and custom travel training. The process of evaluation and certification of individual's travel skills, as well as other safety and emergency procedures are also included in its work plan. MTM will measure the success of travel training and the impact by using its Program Evaluation Summary Report to track monthly and annual services. With the clarification from the interview, the developing cost of workshop materials from MTM is included in the cost proposal, but not the material printing cost. MTM is located in St. Louis, Missouri, and proposed to perform the requested services through its office currently providing ADA eligibility assessment to Access services in Los Angeles County.

### Cost and Price

Pricing scores were based on a formula which assigned the higher score to the firm proposing the lower price and scored the other firm's total price based on its relation to the lower price. MMP's proposed total price is slightly lower than MTM's.

**Procurement Summary**

Based on the evaluation of the written proposals, the firm's qualifications, as well as the information obtained from the interviews, the evaluation committee recommends the selection of MMP as the firm to provide mobility management services.

**Fiscal Impact**

The project was included in the OCTA Fiscal Year 2019-20 Budget, Operations Division, Account 2147-7519-D1208-THP using local transportation funds.

***Summary***

Based on the information provided, staff recommends the Board authorize the Chief Executive Officer to negotiate and execute Agreement No. C-9-1244, between the OCTA and MMP, in the amount of \$248,911, to provide mobility management services for a one-year initial term with one, two-year option term.

***Attachments***

- A. Review of Proposals, RFP 9-1244 Mobility Management Services
- B. Proposal Evaluation Criteria Matrix, RFP 9-1244 Mobility Management Services
- C. Contract History for the Past Two Years, RFP 9-1244 Mobility Management Services

**Prepared by:**



---

Gracie A. Davis  
Section Manager, ACCESS Eligibility  
714-560-5641



---

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

**Approved by:**



---

Beth McCormick  
General Manager, Operations  
714-560-5964



---

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