



**September 11, 2025**

**To:** Transit Committee

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

**Subject:** Agreement for OC ACCESS Eligibility Assessments and Transit Support Services

### **Overview**

On March 24, 2025, the Board of Directors approved the release of a request for proposals to select a firm to provide OC ACCESS eligibility assessments and transit support services. Proposals were received in accordance with the Orange County Transportation Authority's procurement procedures for professional and technical services. Board of Directors' approval is requested to execute an agreement for OC ACCESS eligibility assessments and transit support services.

### **Recommendations**

- A. Approve the selection of MTM Transit, Inc., as the firm to provide the management and operations of the OC ACCESS eligibility assessments and transit support services.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-5-3959 between the Orange County Transportation Authority and MTM Transit, Inc., in the amount of \$4,428,810, to provide OC ACCESS eligibility assessments and transit support services for an initial three-year term commencing on January 1, 2026, with one, two-year option term.

### **Discussion**

The Americans with Disabilities Act of 1990 (ADA) requires public transportation agencies that operate fixed-route services to provide complementary paratransit service for individuals who, due to a disability, are unable to use the fixed-route system. To comply with this requirement, the Orange County Transportation Authority (OCTA) implemented OC ACCESS service in 1993. Unlike fixed-route service, OC ACCESS requires trip reservations to be made at least one day in advance and offers door-to-door transportation.

Title 49, Part 37 of the Code of Federal Regulations under the ADA requires public entities providing complementary paratransit service to establish an eligibility process that verifies applicants meet regulatory criteria. Since 2005, all OC ACCESS applicants have completed an in-person functional assessment, which remains the most effective method to evaluate physical and cognitive limitations and determine eligibility under ADA standards.

Consistent with ADA guidelines, OCTA requires periodic recertification of paratransit eligibility. To enhance the rider experience and reduce costs, OCTA has implemented an automatic renewal process for individuals whose conditions are not expected to improve, eliminating the need for repeat in-person assessments. In addition, OCTA will begin offering virtual assessments in certain recertification cases, providing flexibility for applicants while improving efficiency.

OCTA's Travel Training Program, piloted in 2017 and formally adopted in 2019, helps OC ACCESS riders, seniors, and individuals with disabilities learn to use the fixed-route system. The program was expanded in 2020 to include the general public and multilingual support in Chinese, Korean, Mandarin, Spanish, and Vietnamese.

To further improve accessibility, OCTA is also introducing a Marking and Tethering (MAT) Program, which identifies the most effective securement points on mobility devices, reducing boarding times, improving safety, and enhancing overall service efficiency for both paratransit and fixed-route riders.

Under this agreement, the Travel Training and MAT programs will be integrated into the OC ACCESS eligibility assessment process, allowing direct referrals following in-person assessments.

The proposed new agreement includes fixed-rate and variable-rate components, offering both cost control and flexibility. Fixed costs will cover administration, overhead, the facility lease for the certification center and required equipment. Variable costs will be reimbursed on a per-unit basis for each service type, promoting efficient resource allocation and incentivizing the contractor to improve service quality and performance.

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***Procurement Approach***

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

On March 24, 2025, the Board approved the release of Request for Proposals (RFP) 5-3959 which was issued electronically on CAMM NET. RFP 5-3959 was advertised in a newspaper of general circulation on March 26 and April 2, 2025. A pre-proposal conference was held on April 2, 2025, with five attendees representing two firms. Four addenda were issued to make available the pre-proposal conference registration sheets and presentation, as well as to respond to questions received.

On April 23, 2025, two proposals were received. An evaluation committee comprised of staff from Contracts Administration and Materials Management, Specialized Transit Services, Contracted Services Administration, and Marketing and Customer Service departments, as well as an external evaluator from Los Angeles Access Services, met to review the proposals.

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

- |                                     |            |
|-------------------------------------|------------|
| • Qualifications of the Firm        | 20 percent |
| • Staffing and Project Organization | 30 percent |
| • Work Plan                         | 25 percent |
| • Cost and Price                    | 25 percent |

Several factors were considered in developing the evaluation criteria weightings. Qualifications of the firm was weighed at 20 percent to ensure the proposing firms demonstrated prior experience providing similar service as required in the RFP. Staffing and project organization was assigned the greatest level of importance with a weighting of 30 percent as it is critical for the firm to have experienced and qualified staff to perform the services. Work plan was weighed at 25 percent to emphasize the importance of the firm demonstrating its understanding and approach to completing the services as specified in the scope of work. Cost and price was weighed at 25 percent to ensure OCTA received competitive pricing and value for the services.

On May 13, 2025, the evaluation committee reviewed and discussed both proposals based on the evaluation criteria. The firms are listed below in alphabetical order:

Firm and Location

ADARide.com LLC (ADARide.com)  
Headquarters: Carson, California  
Project Office: Carson, California

MTM Transit, Inc. (MTM)  
Headquarters: St. Louis, Missouri  
Project Office: Orange, California

On May 20, 2025, the evaluation committee conducted interviews with both firms. The interviews consisted of a presentation by each firm to demonstrate the firms' understanding of OCTA's requirements and to discuss their approach to performing the scope of work. The firms' project managers and key team members had an opportunity to present each team's qualifications and respond to the evaluation committee's questions. Questions were asked relative to the firms' understanding of the scope of work, their approach to performing the services as outlined in the scope of work, and their approach to addressing potential challenges based on the firm's experience on similar projects.

At the conclusion of the interviews, a request for a best and final offer (BAFO) was sent to both firms to seek additional clarifications and final pricing.

Based on evaluation of the written proposals, the firms' qualifications, the proposed pricing, as well as the information obtained from the interviews and BAFO, the evaluation committee recommends MTM for consideration of the award to provide OC ACCESS eligibility assessments and transit support services. The following is a summary of the evaluation results.

**Qualifications of the Firm**

MTM was established in 2009 with a local office in Orange, California. MTM is the current contractor performing functional assessments to determine OC ACCESS eligibility and has been performing these services for OCTA since August 2020. MTM has provided similar services to clients across the United States for over 15 years. MTM has 13 years of experience conducting travel training services and eight years of conducting MAT services. MTM received positive feedback from their references.

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ADARide.com was established in 1994 and is based in Carson, California. The firm experience includes agencies such as the Los Angeles Access Services, Victor Valley Transit Authority, and North County Transit District. ADARide.com received positive feedback from references.

#### **Staffing and Project Organization**

MTM proposed a well-structured key personnel team to support OCTA's program objectives and ensure service continuity with readiness for program enhancements. The proposed staffing plan includes a project manager, an operations manager, a travel training coordinator, a mobility assessment evaluator (MAE) supervisor, and four MAEs. All key personnel will be fully dedicated to the OCTA program and based on-site at the local facility. These positions are proposed to support OCTA's current scope, and anticipated growth in eligibility assessments, travel training, and related MAT programs. During the interview, the MTM team described their tailored approach to each phase and how they would approach transitioning from the current program to the new fully integrated program.

ADARide.com proposed a qualified project team led by professionals. The local eligibility team lead brings over ten years of clinical experience. However, the proposed staffing plan includes a relatively small number of dedicated personnel, with four evaluators, one project supervisor, and an undefined virtual support team. During the interview, the team provided high-level details on their approach, which outlined a transition from in-person assessments to their integrated turnkey platform; however, details were not fully addressed.

#### **Work Plan**

MTM's work plan demonstrated a comprehensive understanding of OCTA's scope of work, its objectives, and key stakeholders from their experience supporting OCTA on the OC ACCESS Eligibility Assessments Program since August 2020.

The proposed work plan demonstrated a clear understanding of the requirements of the new contract term, including the addition of the travel training and MAT programs, consistent with the scope of work. MTM proposed a seamless transition with no service disruption, supported by a turnkey facility and opportunities for future service expansion. The proposal includes a detailed implementation timeline for new services and outlines the integration of OCTA's technology software into the program. Roles and responsibilities were clearly defined, with oversight provisions to ensure accurate and unbiased eligibility assessments. MTM has established ADA-compliant policies that align with both OCTA's and the Federal Transit Administration requirements, reflecting the firm's preparedness to effectively support OCTA's project delivery efforts.

ADARide.com's proposed work plan presents a comprehensive approach with a hybrid flexibility model and established location for mobility conferences. However, there were limited details regarding the delivery of MAT. While the travel training component demonstrated a strong focus on individuals who may qualify for fixed-route services, no emergency preparedness or contingency plans for potential transition issues were provided.

#### **Cost and Price**

Scores for cost and price were based on a formula that assigned the highest score to the lowest proposed price, and ranked the remaining prices based on their relation to the lowest proposed price. Cost and price were reviewed by staff from the Financial Planning and Analysis Department, which analyzed fixed and variable cost components. MTM proposed the lower overall price for the initial three-year term of the contract, and the option term. Therefore, MTM's proposed pricing is deemed fair and reasonable.

| <b>Firm</b> | <b>Initial Term<br/>Total Price</b> | <b>Option Term<br/>Total Price</b> | <b>Total Price<br/>All Years</b> |
|-------------|-------------------------------------|------------------------------------|----------------------------------|
| MTM         | \$4,428,811                         | \$3,774,487                        | \$8,203,298                      |
| ADARide.com | \$8,154,129                         | \$6,123,842                        | \$14,277,971                     |

#### **Procurement Summary**

Based on the evaluation of the written proposals, the firm's qualifications, the information obtained during the interviews and the BAFO, the evaluation committee recommends the selection of MTM as the top-ranked firm to provide OC ACCESS eligibility assessment and transit support services. The firm demonstrated a thorough understanding of OCTA's requirements and submitted a comprehensive proposal that is responsive to all the requirements of the RFP.

#### **Fiscal Impact**

The budget associated with this project was included in OCTA's Fiscal Year 2025-26 Budget, Operations Division, Specialized Transit Services Department, account nos. 2147-7519-D1208-8T7 and 2147-7519-D1208-4AM.

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***Summary***

Staff is recommending the Board of Directors authorize the Chief Executive Officer to negotiate and execute Agreement No. C-5-3959 between the Orange County Transportation Authority and MTM Transit, Inc., in the amount of \$4,428,811, to provide the management and operations of OC ACCESS eligibility assessments and transit support services for an initial three-year term commencing on January 1, 2026, with a two-year option term.

***Attachments***

- A. Review of Proposal RFP 5-3959 OC ACCESS Eligibility Assessments and Transit Support Services
- B. Proposal Evaluation Criteria Matrix, RFP 5-3959 OC ACCESS Eligibility Assessments and Transit Support Services
- C. Contract History for the Past Two Years, RFP 5-3959: OC ACCESS Eligibility Assessments and Transit Support Services

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