

REQUEST FOR PROPOSAL

The Community Transportation Association of America (CTAA) is soliciting proposals from qualified consulting firms to conduct research and analysis of one-call services¹ around the country, to identify peer mentors, and develop online tools and resources. The main goals are to elicit information and learn from exemplary one-call service providers. The products generated will aid communities, regions, states, human service and transit agencies, and information and referral providers, in the development and implementation of one-call services for public, human services, and employment² transportation. The firm will (1) research one-call services of all types; (2) create a categorized inventory of existing one-call services; (3) conduct interviews to obtain in-depth information from existing one-call services staff and information sources; (4) identify and describe best practices and peer mentors from existing one-call services; and (5) develop one-call service community self-assessment and planning tools.

BACKGROUND INFORMATION: From the most rural to the densest urban areas, mobility throughout one's community is a key component to quality of life and independence. Access to various goods and services, employment, social networks, and healthcare necessitates access to some means of transportation. For many, this means using a personal vehicle; for others, including many older adults, people with disabilities, and people with low incomes, community and public transportation provide the invaluable connection to local resources.

For the person who needs transportation, it can be difficult to find information about public, human services, and employment transportation and to arrange rides. Available information and referral sources often require several telephone calls or visits to multiple websites.

The goal of one-call services is to make life easier for riders so that only one telephone call or a visit to a single web page is necessary to find out about transportation options and, if necessary, to schedule a ride. Some communities have solved this problem through one-call information sources, such as a 211 number, an Aging and Disability Resource Center (ADRC), employment-related ride matching services, or a transportation one-call center.

Behind the scenes, a one-call service requires coordination among those organizations that provide human services, transportation, employment and employment-related services and information and referral. The one-call philosophy of putting riders first means building a more

¹ The term "one-call service" refers to resources available either by telephone or on the Internet for obtaining information about public, employment and human services transportation and, where relevant, for arranging of trips. Human services transportation includes, but is not limited to, transportation for non-emergency medical appointments, appointments with human services professionals, community services, and transportation for people with disabilities, people with low incomes, youth, and older people. These terms encompass multiple modes, public or private, including, but not necessarily limited to, traditional public transportation, van or carpooling, ride matching, slugging, demand-response, deviated route, and volunteer transportation.

² The term "employment transportation" refers to employment-related public or private shared trips for purposes of commuting and employment services, such as job training, apprenticeships, and jobs.

coordinated transportation system and it means organizations, such as human service agencies, transit authorities, workforce development organizations and private employers understanding differences and finding common ground.

CTAA seeks to accomplish three main objectives: First, to identify current one-call service peer mentors and promising practices; second, to collect information (via research and in-depth interviews) from existing one-call service providers and relevant information sources; and third, to develop self-assessment and implementation tools for those considering starting a one-call service.

The research and products will provide technical guidance to communities, transportation providers, human service agencies, employment-related organizations and information and referral entities in the planning and implementation of one-call services. Through the web-based resources, states and communities will have access to different models of best practices and tools for community engagement, planning and development of one-call services.

ISSUING OFFICE: This RFP is issued by the Community Transportation Association of America (CTAA), which is the sole point of initial contact for proposing agencies. Questions regarding this RFP should be submitted to Sheryl Gross-Glaser at grossglaser@ctaa.org.

Proposals shall be submitted by the proposing firm's principal, with a signed original copy binding the firm to the submitted bid price for a period of no less than thirty (30) days. **One (1) signed original hardcopy and one (1) email with a copy of the proposal attached (in a pdf or Word file)** are due on or before **3:00 PM on Monday, Nov. 16, 2009**. The original hardcopy must be received, regardless of postmark or delivery method, at the following address by this deadline. The email and attachment must be sent to the following email address and also received by this deadline. Communications submitted by fax are **not** acceptable.

Signed original hardcopy to be sent to:

**Community Transportation Association of America
Attn: One Call Services Project
1341 G Street, NW
10th Floor
Washington, D.C. 20005**

Email, with proposal attached, to be sent to grossglaser@ctaa.org, with the subject line: One Call Services Project.

WORK STATEMENT

SCOPE OF SERVICES: Consultants are requested to develop a detailed work plan that identifies the methodologies for completing each task, as outlined in the following section. The consultant work plan will also identify products to be generated for each task.

The products generated during this project will aid communities, regions, states, human service and transit agencies, and information and referral providers, in the development and implementation of one-call services for public, employment, and human services transportation. The term “one-call services” refers to resources available either by telephone or on the Internet for both obtaining information about public, employment and human services transportation and, where relevant, arranging of trips. Human services transportation includes, but is not limited to, transportation for non-emergency medical appointments, appointments with human services professionals, community services, and transportation for people with disabilities, people with low income, youth, and older people. Employment transportation refers to employment-related publicly provided trips or private shared trips for purposes of commuting and employment services, such as job training, apprenticeships, and jobs.

These one-call services may be stand-alone operations or components of other information and referral programs, including, but not limited to, 211 and 511 programs, Aging and Disability Resource Centers (ADRC), ride matching services, or transportation one-call centers.

The main goals are to elicit information and learn from exemplary one-call service providers. CTAA seeks to accomplish three main objectives: First, to identify current one-call service peer mentors and promising practices; second, to conduct interviews to obtain information from existing one-call services staff and information sources; and third, to develop self-assessment and implementation tools for those considering the creation or improvement of a one-call service.

The firm will (1) research one-call services of all types; (2) create a categorized inventory of existing one-call services; (3) conduct interviews to obtain information from existing one-call services staff and information sources; (4) identify and describe best practices and peer mentors from existing one-call services; and (5) develop one-call service community self-assessment and planning tools.

The following series of tasks identifies the minimum project requirements and consultant responsibilities. Consultants are encouraged to view these tasks as minimum project guidelines and to develop each task and deliverable in an innovative manner.

I. Research and Interviews

Conduct research and in-depth interviews to identify and obtain information about one-

call services for public, employment and human services transportation, including, but not limited to, 211 and 511 programs, Aging and Disability Resource Centers (ADRC), ride-matching services or transportation one-call centers. CTAA expects to learn and share lessons about stakeholders, leaders, information sharing, funding, challenges and lessons learned. An “Interview Template” should include, but is not limited to, inquiries about how staff and others decided on the particular one call strategy, what questions they asked themselves when developing and implementing the service, what factors they looked for, what key elements led them to their decisions during the initial stages, and what they would do differently if they had the opportunity to begin their project anew. The “Interview Template” should be a series of structured questions for service providers for use during this project and as an online tool for use after this project. This is not intended as a rigid process, but rather as a starting point to obtain information.

II. Categorized Inventory of Existing One-Call Services

Categorize by type of service, type of organization in which it is housed, and how it is funded and staffed. Describe the scope and effectiveness of the service provided.

III. Identification and Description of Peer Mentors and Best Practices

Identify peer mentors and best practices. Identify individual peer mentors and explain why they were chosen. Identify best practices in the planning, implementation and operation of one-call services, and explain why they were chosen. It is expected that in-depth interviews will be conducted as part of the process to identify and obtain information about potential peer mentors and best practices. Describe the scope and effectiveness of the service provided as well as how staff and others decided on the particular one call strategy, what questions they asked themselves when developing and implementing the service, what factors they looked for, what key elements led them to their decisions during the initial stages, and what they would do differently if they had the opportunity to begin their project anew. Funding, stakeholder, leadership and other challenges should be discussed.

IV. Creation of a Toolkit for Developing Transportation One-Call Services

The resource(s) developed should be in online user-friendly formats. In consultation with CTAA, some or all of the resource(s) may be prepared as series of fact sheets and guided questions. This interactive resource or set of resources has two parts, each with its own purpose: (1) to help communities, states and regions assess themselves in terms of whether a one-call service will address a particular area’s needs and whether it is ready to develop one-call services; and (2) to assist with an area’s planning and implementation processes for a one-call service. The self-assessment part of the guide should be prepared as an online resource(s) for communities, regions, states, human service and transit agencies, employment organizations, information and referral providers, and others to direct the decision of whether to develop a one-call service for public, employment and human services transportation. The planning and

implementation resource(s) should provide sufficiently flexible guidance for communities, states and regions to select different modes of one-call service delivery, while emphasizing the need for coordination and effective and cost-efficient service delivery.

- V. Test the Toolkit for Developing Transportation One-Call Services with those interested in beginning one call services in a one-on-one setting or at group events such as Institute for Transportation Coordination workshops and CTAA Expo workshops.

INFORMATION REQUIRED FROM CONTRACTORS

WORK PLAN: Describe the scope of work, including:

1. The specific tasks which will be performed.
2. The type of information which will be developed.
3. All deliverable products and the type of format in which they will be submitted.
4. A project scheduling chart illustrating thresholds for each task completion and key target dates for the development and completion of all project tasks and deliverables. NOTE: This project will be initiated on or about December 1, 2009 and must be completed by June 30, 2010.

PROJECT ORGANIZATIONAL CHART: Submit a project organizational chart identifying the responsible Officer, project manager, and staff assigned to the project. Provide a description of proposed staff members and tasks/roles they will perform. If a subcontractor(s) is to be used, describe the personnel, responsibilities, and specific tasks to be performed by the subcontractor(s), the cost of each subcontractor, and the qualifications and experience of all subcontractors proposed for the project.

COST PROPOSAL: Consultants must submit a detailed cost estimate including cost of services, travel cost, materials and printing, indirect costs and fees. CTAA reserves the right to negotiate final contract price for completion of all project tasks with qualified consultants.

CONSULTANT QUALIFICATIONS: Proposals should include a summary of relevant experience and consultant qualifications in areas relating to the goals and objectives of this project. Qualifications of individual staff members proposed for the project (exclusive of support staff) should be included in the qualifications section. Consultants are encouraged to include project descriptions of similar studies completed, and a list of references that can be contacted.

CONSULTANT SELECTION

The consultant selection process will consist of review of written proposals and background materials and may include a telephone conference with finalists. On-site interviews are not anticipated. If an agreement cannot be reached between CTAA and the selected consultant, an alternative firm or firms will be contacted until an agreement can be reached.

The criteria for selecting consultants will focus on certain characteristics of each bidder and their prospective proposals. Consultant proposals will be evaluated and assigned weighted points based upon their relative strength and experience in the following areas:

1. Thorough knowledge of and familiarity with information and referral services as they relate to transportation. (10 points/weight 2)
2. Experience with and demonstrated ability in research, interviewing, and other information gathering techniques used to identify and categorize information. (10 points/weight 1)
3. Experience in developing assessment tools and/or writing guides for use in different types of communities. (10 points/weight 1)
4. Experience with testing assessment tools in different types of communities and across different professional fields. (10 points/weight 1)
5. Relevance, creativity, and cost effectiveness of consultant's proposal in responding to identified needs. (10 points/weight 3)
6. Relevant skills and abilities of staff members proposed for project. (10 points/weight 2)
7. Cost of providing services for successful project completion. (10 points/weight 1)

PROJECT DOCUMENTS

- A. Consultants will be required to submit monthly progress reports to CTAA within five working days of the end of each month. Progress reports should include a detailed narrative description of work underway and completed, problems encountered, documentation of adherence to project timeline including percentage of each task completed, and products developed for the month.
- B. A minimum of five (5) documents/online resources (or sets of documents/online resources) must be submitted by the selected consultant during the course of the project. These were discussed in detail in the Work Statement. They include:
1. Categorized Inventory of Existing One-Call Services
 2. "Interview Template" for Identifying One-Call Service Peer Mentors and Best Practices
 3. Identification of Peer Mentors and Best Practices
 4. One or two-page briefs discussing identified best practices and peer mentors.
 5. Toolkit for Developing Transportation One-Call Services
- C. The selected consultant will be required to submit drafts of the above documents/online resources upon completion of relevant proposed project tasks. CTAA reserves the right to request changes and necessary modifications to the drafts within 25 calendar days of submittal. The selected consultant will be required to respond to requested changes and revisions to the drafts within 25 calendar days.

GENERAL INSTRUCTIONS

COMPENSATION PAID TO CONSULTANT: Compensation paid to the selected Consultant is subject to the amount specified in the proposal unless otherwise agreed by CTAA. Terms of periodic payments under this contract will be negotiated with the consultant.

ACCEPTANCE OF PROPOSAL: The contents of both the proposal and the RFP will become contractual obligations if a contract is entered into. Failure of the successful proposer to accept these obligations in a contractual agreement may result in cancellation of the award. In the event of a contract award, the definitive contract will constitute the entire agreement of the parties and will supersede any representations, commitments, conditions, or agreements made orally or in writing prior to execution of this contract.

NONCOMPLIANCE: In the event of the consultant's noncompliance with the RFP or the selected proposal, which both comprise parts of any resultant contract, CTAA shall impose such contract sanctions as it may determine appropriate, including but not limited to: withholding of payments under the contract until the consultant complies, and/or cancellation, termination, or suspension of the contract, in whole or in part.

CONTRACT CHANGES: The parties hereto may from time to time require changes in the scope of services and /or the scope of work and the time of performance as set forth herein. Such changes, including any increase or decrease in the amount of compensation to the consultant, which are mutually agreed upon by and between the parties hereto, shall be incorporated as written amendments to this contract. Any claim by the consultant for an adjustment under this clause must be asserted within thirty (30) days from the date of receipt by the consultant of the notification of change; provided, however, that CTAA may, at its discretion, receive and act upon any such claim asserted at any time prior to final payment under this contract.

ASSIGNMENT: No right or duty in whole or in part by the contractor under this contract may be assigned or delegated without the written consent of CTAA.

HOLD HARMLESS: The contractor will indemnify and save harmless CTAA and all its officers, agents, and employees from all suits, actions or claims of any character brought for or on account of any injuries or damages received by any persons or property resulting from the operations of the contractor, or of any of its contractors, in prosecuting work under this contract.

REJECTION OF RESPONSES/PROPOSALS: CTAA reserves the right to reject any and all responses and proposals received as a result of this request, or to negotiate separately with competing contractors.

INELIGIBILITY: Employees, CTAA State Delegates and members of the Board of Directors of

CTAA are ineligible to respond to this Request for Proposal or contract with CTAA as direct contractors or subcontractors.

TERMINATION: CTAA reserves the right to terminate the contract at any time by giving the consultant written notice of such termination. Such termination shall be effective on the date of the notice of termination. In the event of said termination, CTAA shall be liable only for the services rendered to the date of termination based on contractually established fees.

PROPRIETARY INFORMATION: All data, documents, materials, and innovations developed as a result of this project become the property of CTAA, and will be available for unrestricted use and publication.

EQUAL EMPLOYMENT OPPORTUNITY: It is the policy of CTAA to afford equal opportunity in employment to all individuals. In connection with this proposal, and any subsequent contract, the consultant shall not discriminate against any employee or applicant for employment because of race, color, creed, religion, national origin, disability, or sex. Such action shall include, but is not limited to, the following: recruitment: rates of pay or other forms of compensation, and selection for training, including internship and/or apprenticeship. Contractor further agrees to insert a similar provision in all subcontractors.

DISADVANTAGED BUSINESS ENTERPRISE (DBE) AND WOMEN ENTERPRISE (WBE):

It is the policy of CTAA that disadvantaged business enterprises as defined by 49 CFR Part 23 shall have the maximum opportunity to participate in the performance of contracts financed in whole or part with Federal funds under this agreement. Consequently, the DBE requirements of 49 CFR Part 23 apply to this agreement. CTAA or its contractor agrees to ensure that disadvantaged business enterprises as defined in 49 CFR Part 23 have the maximum opportunity to participate in the performance of contracts and subcontracts financed in whole or in part with Federal funds provided under this agreement. In this regard all recipients or contractors shall take all necessary and reasonable steps on accordance with 49 CFR Part 23 to ensure that disadvantaged business enterprises have the maximum opportunity to compete for and perform contracts. CTAA's DBE contract goal for 2009 is 3.1%. Copies of CTAA's DBE Participation Program are available by contacting CTAA's DBE Liaison Officer at Kellogg@ctaa.org or 202.415.9682.

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