



**MORONGO BASIN TRANSIT AUTHORITY
(MBTA)**

**REQUEST FOR PROPOSAL
RFP# 11-02**

**Comprehensive Operational Analysis /Unmet Needs and
Farebox Study**



Project Description

Morongo Basin Transit Authority (MBTA), a Joint Powers Agency and public transit provider in the lower desert subarea of San Bernardino County is requesting proposals to conduct a Comprehensive Operational Analysis, Short Range Transit Plan, Unmet Needs and Farebox Study for Fiscal years 2012 – 2016 of MBTA. The consultant chosen will coordinate its study activities with staff of the MBTA and the San Bernardino Associated Governments (SANBAG).

An electronic copy of the RFP document is available at no charge for download at www.mbtabus.com

Estimated Schedule

March 11, 2011 MBTA's release RFP

April 11, 2011 Potential Pre-Proposal Meeting via Teleconference (Mandatory)

April 18, 2011 Questions due to MBTA

April 25, 2011 Responses to Interested Bidders

May 30, 2011 Proposals due to MBTA by 2 pm

June 13, 2011 Potential Consultant Interviews

June 23, 2011 Recommendation to MBTA Board-Award

This schedule is subject to change if determined necessary by MBTA. Any changes will be issued by addendum to firms providing contact information to MBTA during the question and response period shown above. All addendums and Notices of Action will be posted on www.mbtabus.com

Proposal Submission

All proposals must comply with the submittal requirements. Proposals that do not comply will be considered non-responsive and will be rejected, at the discretion of MBTA. Proposals shall include the information and services requested and must be signed with the name and title of the person duly authorized to commit services by the firm.

Proposals shall be in a sealed box or envelope and addressed to:

Joe G. Meer, MBTA General Manager on or before the submittal deadline of **May 30, 2011 by 2:00 pm. RFP#11-02 must be referenced in the proposal Transmittal Letter.**

No proposal received after the submittal deadline will be considered, at the discretion of MBTA. Late proposals will be returned to the proposer unopened. Proposals will not be publicly opened and will be kept confidential. Proposals are required for the entire scope of services described. Proposals that do not address the entire scope of services or improperly written, may be considered non responsive and rejected.

Firms responding to the RFP shall submit (6) six copies of their proposals. One copy shall contain all original signatures and shall be labeled "Original Proposal."

Proposal Requirements and Organization

Firms shall review and base their proposals on the draft Scope of Services, Exhibit A. Strict conformance to the specified proposal format and completeness of the required content are essential. Firms that do not address all of the required submittals and associated documentation may be considered non responsive and will not be eligible for contract award. Each section of the proposal shall be tabbed in accordance with the numbering system shown below. MBTA strongly considers the Proposal content and completeness to be most important. Elaborate, decorative, extraneous, and non recyclable materials are strongly discouraged. The proposal shall be submitted in an 8 ½ x 11 format and may use foldouts as necessary but shall not exceed 11 x 17. The cover shall clearly contain the project title, contract number, and the firm's name. While the length of the proposal will not be limited, short and concise proposals are preferred. Excessive and wordy proposals could result in lower scores and non selection. The firms able to prepare a complete but succinct proposal may be scored higher.

Proposal Format

1. Letter of Transmittal

The letter of transmittal shall be addressed to Joe G. Meer including the following:

- MBTA RFP number shown above.
- An identification of the firm(s) involved in the Proposal and which firm of any joint venture is proposed as the prime consultant. While joint ventures are accepted, they are discouraged.
- A statement acknowledging the receipt of all addenda to the RFP that have been issued by MBTA.
- A statement that the firm has reviewed and accepted the insurance requirements.
- A statement that the Proposal will remain in effect for 120 calendar days after the deadline for receipt of the Proposal by MBTA.
- A contact person who should be notified of the Selection Committee's decision, a telephone number, fax number, e-mail, and mailing address.
- The name, title, address, e-mail, and telephone number of individual(s) with authority to bind the company contractually and who may also be contacted during the period of proposal evaluation.
- The legal form of the firm, i.e., sole proprietor, partnership, corporation, etc. If the firm is a corporation, the state in which the company was incorporated shall be identified.

2. Section 1 - Organization Chart

The Organization Chart shall show the relationship of all sub-consultants to the prime consultant and shall identify the staff member, responsibility, and firm name for each category and/or task. The chart shall be limited in format, i.e. - one (1), fold-out, one-page, 11" x 17" format.

3. Section 2 - Consultant Team Qualifications

The Consultant shall provide a summary of their team's qualifications and experience managing and executing similar projects. This section is limited to three (3) pages. **It is strongly encouraged that extraneous and over-stated qualifications be eliminated.**

4. Section 3 - Project Understanding and Approach

The Consultant shall discuss in detail their understanding and approach of the MBTA's goals and objectives for the Project. From this, a complete and thorough approach is to be developed to demonstrate the Consultant's ability to provide MBTA with a cost-effective and successfully executed project.

Using the draft Scope of Services from Exhibit "A", the Consultant should review and may make revisions as they see necessary. The proposed Scope of Services will be used for a final contract unless otherwise revised by MBTA during contract negotiations.

5. Section 4 - Project Management

The Consultant shall demonstrate their abilities to manage the Project, not only for the prime consultant but how their relationship/processes with sub-consultants will be managed. This section shall at a minimum include the methods and means for project controls, QA/QC, resource allocation, and staff availability.

6. Section 5 - Resumes

The Consultant shall provide resumes of key personnel that will be assigned to the Project. Resumes should describe what tasks the person performed on a project and not just a list of projects the person work on. Only show relevant information keeping resumes as short as possible.

7. Section 6 - Related Experience

The Consultant shall provide sufficient descriptions of related experience that will demonstrate their team's ability to perform the work as described in Sections 3 and 4 above, limited to no more than 10 projects. Each related project shall be a maximum of one page long and clearly show the following items:

- Project Description
- Client
- Contract Amount of Consultant Services Provided
- Consultant Services Provided as Prime or Sub-consultant
- Duration of Services Provided
- Reference – Contact name, address, and phone and fax number. This as well as other sources may be used as a reference check of the Consultant's past performance.

8. Section 7 – Appendices/Miscellaneous/Supporting Documentation

This section may be used by the Consultant to include miscellaneous items as they feel necessary to demonstrate their team's qualifications that are not required above.

Evaluation of Proposals

An selection team composed of MBTA staff, staff of the San Bernardino Associated Governments (SANBAG) and neighboring agencies will be established to review all proposals submitted pursuant to the terms of this RFP. Members of this team are expected to participate, if possible, in any interviews to be conducted with selected proposers. The evaluation of proposals will be based on the following criteria and relative value established by MBTA.

Category A: Technical (Total 50 Points)

1. Completeness of the proposal submitted and compliance with the terms and conditions of the RFP (Incomplete or vague proposals may be rejected).
2. Demonstrated understanding of the RFP as shown by the contractor's technical proposal.
3. Project Approach and Methodology proposed by consulting firm and any other additions to the scope of work as described by MBTA

Category B: Organization and Management (Total 50 Points)

1. Experience and qualifications of the proposed project team
2. Experience and qualifications of the contractor indicating demonstrated levels of expertise based on the proposal and responses to reference checks.

There is no financial component to the evaluation as the proposers are asked to submit a proposal that falls within the project budget as described within the scope of work.

Exhibit A

Project Overview and Scope of Services

Request for Proposal Background

Comprehensive Operational Analysis, Short Range Transit Plan and Unmet Needs Study

MBTA is a Joint Powers Agency serving the communities of Joshua Tree, Twentynine Palms, Yucca Valley and unincorporated areas of the lower desert subregion of San Bernardino County. The agency operates demand response, fixed route and commuter services operating approximately 700,000 miles and carrying 360,000 passenger annually. The service over the last decade has been characterized by steady ridership growth and relatively high farebox recovery for a rural transit system. Agency and independent surveys by consultants engaged by MBTA and SANBAG document a high degree of customer satisfaction with the system's operation as a whole. At its annual Unmet Needs hearings, the agency hears recurring testimony requesting extension of services into the weekends, nights and into the more sparsely populated parts of its service area. Farebox policies have not been significantly changed since 1999. Farebox has been maintained by the agency's cost containment measures and by increasing ridership volume. The agency believes it's service plan which is reliant on deviated fixed services for much of ADA compliance is responsible for relatively high levels of productivity for a rural system. MBTA does not use all of its available Local Transportation (LTF) funding returning these amounts to the member agencies for street and road repair. A budget of \$100,000 has been established to fund the study using non-federal funding.

SCOPE OF WORK

Introduction

Phase I

Comprehensive Operating

Analysis of all Services

To the degree necessary, consultant will undertake a broad gauged comprehensive operation analysis of all MBTA services (fixed route, demand response, commuter services) and related policies by which these services are provided. This evaluation of existing operating conditions shall be in relation to service performance, running times, recovery times, recovery time locations, deadhead hours/miles, schedules, transfer connections, service needs, service strategies, service policies, performance standards, on time performance and stakeholder/customer needs. All strategies deemed useful to this analysis shall be undertaken by the consultant. Staff believes only minor adjustments to the current service plan's routing are necessary to accommodate future growth in the areas and hours currently served.

Unmet Needs

Consultant to analyze Unmet Needs testimony, conduct outreach, utilize appropriate data collection techniques and determine what needs can be reasonably met in a cost effective manner during the fiscal environment encompassed by the study period. MBTA asks that the consultant conduct outreach and analysis that is separate and distinct from previously undertaken efforts and consider creative strategies that may address the identified needs in a cost effective manner.

Farebox Study

Consultant to analyze fare policies and make recommendations. The agency in particular asks that this analysis be integrated with Unmet Needs Study to determine whether revision of fares will offset higher operating costs to operate potentially less productive service.

Financial Analysis

The financial plan shall review the current and projected operating and capital costs, revenues and fare recovery standards over the immediate five year period. This financial analysis should take into consideration uncertain local and state revenues and identify any other possible sources of funding. Financial projections will be supplied by MBTA or SANBAG but may also be supplemented by the proposer's assessment of likely costs and revenues for MBTA current services.

Service Policies

Develop a strategic planning approach to be used in preparing an analysis of and then proposed development, review, or modification of service policies, goals and objectives, including performance standards by which to measure current and future performance.

Paratransit Plan

Consultant to analyze MBTA's agency's complementary Paratransit services and make recommendations as to how ADA needs ought to be met during the study period. A written plan is requested to be submitted as a separate document to the COA. Paratransit Plan to address requirements for federal funding as per 49 CFR, Part 37, Section 135 (b).

Service Needs – Public Outreach

Methods shall be proposed and undertaken to evaluation service needs from external and internal stakeholders providing a rationale for both the methods and target audiences.

Summary of Findings

The results of the preceding tasks, in addition to any other activities that may be proposed and undertaken by the consultant, shall be compiled along with a summary of findings and discussions of the issues. This summary shall assess the current structure of MBTA services in terms of the degree of match and mismatch with the identified mobility needs and issues. A discussion of performance measures shall be included assessing individual services relative viability to measure of effectiveness and efficiency and of the Transportation Development Act (TDA) required minimum farebox recovery ratios. Coverage of the overall service area shall be addressed.

Phase II Identify Service Alternatives

The consultant shall prepare alternatives based upon the review and discussion of issues from Phase I. These shall be developed in the context of existing identifiable funding levels but may also incorporate reasonable expectations of bringing in new funding sources, where such funds are identified. Issues to be addressed include:

- Restructuring of routes if and as needed
- Strategies to address potential reduction in funding levels
- Proposed fare policy and discounted fare policy
- ADA implications of restructured service
- Ridership implications
- Preparation of Paratransit Plan
- Unmet Needs/Farebox Policy Recommendations
- New markets/partners for providing new/expanded services
- Budgetary implications – operations and capital
- Implementation timeframe

Public Comment – MBTA Board Presentation/Workshop

Upon preparation of the outline of proposed service alternatives the consultant shall schedule and conduct a noticed public meeting. The meeting shall be held for purposes of providing the public with an opportunity to hear a summary of the key findings, proposed service goals and objectives, and a presentation of proposed service alternatives. The public will be invited to offer comment and observations on the proposed alternative for consideration by the consultant and staff in developing preferred alternatives. A Board presentation and/or workshop shall be scheduled to provide opportunity for the MBTA Board input. Prior to this, a presentation will also be made to the SANBAG Transit and Rail or Mountain and Desert Committee on findings and recommendations.

Phase III

Preparation of an Action Plan

Modified by input developed by MBTA Board and staff and responsive to comments or concerns raised by members of the public, the consultant shall identify the preferred alternatives and prepare an action plan.

The plan shall include at a minimum:

- Short term recommendations
- Prioritized longer term recommendations
- Operations and capital budget requirements and funding plan including identification of funding sources.
- Timeline for implementation
- Selected strategies and tools for implementation
- Paratransit Plan –separate document
- Unmet Needs/Farebox Study
- Any immediate changes proposed to the routing structure shall be accompanied by detailed graphic descriptions of route modifications.

Timeline

Successful proposer is to complete scope of work within 210 days from the date Notice to Proceed is issued.

Presentation of the Action Plan

The action plan, in draft and in finalized formats, shall be presented to the MBTA Board of Directors meeting. Five (5) bound and electronic documents in “Word” and “pdf” formats of the draft and final documents shall be submitted to MBTA.