

## Request for Proposal

*for*

### ON DEMAND MOBILITY SOFTWARE



711 Grand Street, Suite 110

San Rafael, CA 94901

Tel: (415) 226-0855

[www.marintransit.org](http://www.marintransit.org)

Service Requested:	On-Demand Mobility Software
Contract Type:	Software
Contract Duration:	2 Year (minimum) with 3 option year extensions
Date Issued:	October 18, 2019
Proposers' Conference:	October 29, 2019 at 1:00 pm PST
Proposals Due:	November 25, 2019 at 3:00 pm PST
Oral Interviews & Software Demo (if needed):	December 12 & 16, 2019
Anticipated Award:	February 2020

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## MARIN TRANSIT REQUEST FOR PROPOSALS

### Mobility On-Demand Services

#### SECTION 1 – GENERAL INFORMATION

##### 1.1 OVERVIEW OF DISTRICT & CURRENT COUNTY PROGRAMS

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The Marin County Transit District (Marin Transit or District) was formed by a vote of the people of Marin County in 1964 and was given the responsibility for providing local transit service within Marin County. Although Marin Transit has responsibility for local transit services, it does not own any facilities and does not employ its own operators. Instead, Marin Transit contracts with public, private, and nonprofit providers for local bus and paratransit services.

Marin Transit, in partnership with the Transportation Authority of Marin (TAM), is requesting a technology solution to support shared-ride, on-demand transportation service for seniors and those with disabilities. The solution is expected to be well tested and require only custom modifications to meet the goals of the local program in Marin County. The District intends to develop a public-private partnership that leverages private sector technology and software with public sector transit operations and subsidy to target senior riders in need of enhanced mobility services. The vendor(s) should work with the District to develop an accessible program that can complement existing general public transit services provided by the District and other mobility services (taxi, Transportation Network Company (TNC), ridesharing, bikeshare, etc.) in Marin County. Specifically, the District operated Connect on-demand service and the TAM's first/last mile subsidy program are intended to be integrated through this effort. Below is a summary of these two programs.

**Marin Transit Connect:** With the changing landscape in transportation and emerging mobility services, Marin Transit staff have taken a proactive approach to determine how Marin Transit can best adapt to and leverage these changes. In 2016 a Strategic Analysis was conducted for Marin Transit's senior/ADA program (known as Marin Access) that provided guidance for developing new programs and improving current services for older adults and ADA consumers. As follow-up actions, the study suggested that staff develop and pilot a new transportation program with input from riders and contractors to address transportation gaps in convenience and coverage for seniors and persons with disabilities.

In addition, Marin Transit 2016 and 2018 Short Range Transit Plans recognized that mobility services are in the midst of radical changes and that transit needs to respond to these changes and take advantage of benefits for congestion relief and transportation for highly transit-dependent populations. Opportunities for public transit to be part of the solution, alongside private and non-profit partners, led the District to pursue partnerships with the private sector to increase and expand mobility. In 2017 the District received a discretionary federal grant to operate accessible, same-day transit service above and beyond ADA-mandated paratransit. This funding resulted in the District's first app-based, on demand mobility service, Marin Transit Connect.

Marin Transit Connect, developed in partnership with VIA, a mobility technology vendor, began operation in May of 2018. The service was developed as a pilot with full revenue service beginning on July 1, 2018. The Connect service is operated by the District's paratransit contractor, Marin Senior Coordinating Council or "Whistlestop Wheels," with four accessible Ford Transit vans owned by Marin Transit.

The roughly four-square mile service area of Northern San Rafael was selected because it provided a good mix of employment, residential, educational, and other activity centers; a high level of transit services to connect to/from including fixed route local bus, fixed route regional bus, and regional rail; and a high concentration of Marin Access trips and activity centers for these users. While the service

area maintains a fair level of fixed route service, there are many areas of Northern San Rafael that are underserved by transit given the topography's difficulty accommodating fixed route service. Connect was actively layered on top of preexisting services to compliment and add more connectivity within the pre-existing network.

To access the service, riders download the Marin Transit Connect app—powered by VIA—on the iTunes App Store or Google Play Store, depending on their smartphone. Once registered, riders can ride in a Marin Transit Connect shuttle van from any location to any location within the service area. Riders are provided an estimated pick-up, and the app plans a convenient route to the destination. Riders who don't have access to a smartphone can call the Travel Navigators via the Marin Access Information Line to set up an account and schedule rides. Customers without a smartphone can still receive updates on their ride if they have a mobile phone with SMS messaging.

For much of the pilot, service hours of Connect were weekdays from 6:20 AM until 7:00 PM with an accessible vehicle always in service. Service hours and vehicle supply were adjusted over the course of the pilot to respond to demand.

The base fare for the service was set at \$4.00 per trip, per rider for the pilot. This fare allowed a curb-to-curb trip anywhere within the service area. In addition to the regular fare, a monthly pass was also offered at \$40.00 per month which provided unlimited rides for a 30-day period, starting with the date of the first ride. Fares for additional passengers booked on the same reservation experience a discount of 50% for each passenger after the first two on the reservation.

The Connect program provides an on-demand, fully accessible general public service that is geared to provide accessible same-day service to those with disabilities and increase first-last mile connections to the major employers and fixed route network for commuters. Compared to existing fixed route or demand responsive services offered by the District, the single largest difference offered by the new Connect service was the ability to request and manage your trip within a smartphone app. As well, Connect is the only program offered by Marin Transit that is completely cash free and allows integrated payment within the app. A cash option was implemented within the app in the summer of 2019 in order to address equity issues of those who may not have been comfortable having electronic payment on file or unbanked.

Although Connect service is still viewed as a new service and is continuously evolving, the District undertook an evaluation process to assess the program's performance after the first year. The evaluation was intended to develop benchmarks and performance metrics for the program and understand how the service fits in with the District's other fixed route and demand response offerings. The evaluation looked at traditional performance metrics (ridership, productivity, subsidy) and quantified customer feedback and satisfaction using a rider survey. The full report can be downloaded at: <https://marintransit.org/projects/marin-transit-connect-evaluation>

Initial results from the pilot show high utilization by first-last mile SMART train commuters connecting to employment sites. While Marin Transit wants to support first-last mile solutions, the District would like to refocus resources and subsidy on a program that specifically addresses senior/ADA community mobility needs. The District intends to make changes to fare policy and geography in January of 2020 to further these goals and changes to geography will be influenced by customer survey data. Marin Transit intends to continue the current Connect pilot program through June 2020.

**TAM GETSMART First/Last Mile Pilot:** The Transportation Authority of Marin (TAM), in partnership with Lyft and Whistlestop, initiated a promotion program in the fall of 2017 to promote ridership on SMART which commenced that summer. A \$5.00 coupon is available using a code in the Lyft app for Marin shared-ride trips to and from a SMART station. This discount is applied after the rider pays an initial \$2

fare and the rider is responsible for any remaining fare above \$7.00. Since Lyft currently does not maintain a network of accessible vehicles in Marin County, Whistlestop is under contract to provide an accessible service option for riders that need accessible vehicles and schedule rides for individuals without access to smartphones. From March 2018 to March 2019, the program has averaged approximately 40 passengers per day. The time of day split is relatively even, with 13 average passengers in the AM period (6:00 -10:00 am), 14 in the midday (10:00 am-4:00 pm) period, and 12 in the PM (4:00-10:00 pm) period. Average trip length/trip time is not able to be calculated by station, only by month. Average trip length is approximately 3.5 miles, and trip duration is about nine minutes and thirty seconds.

## 1.2 INTRODUCTION

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Marin Transit, in partnership with TAM, requests Proposals from qualified vendors to provide technology to support a shared-ride, on-demand transportation service. This service would be operated by the District using trained drivers and accessible vehicles and services would be focused on supporting short first-last mile trips for commuters and trips for seniors and those with disabilities.

Proposers should review the requirements for the software detailed in Section II and submit a response in conformance with the proposal requirements shown in Section III. TAM will assist the District in their review and selection process. The District expects to award to the top proposer based on the selection criteria outlined in Section III. The District and TAM may award to more than one vendor depending on the ability of each vendor to meet district needs and requirements.

This RFP is open to all firms with the ability to provide the stated requirements listed in this Solicitation. This RFP consists of the following key documents:

- Section I – General Information

- Section II – Scope of Work

- Section III – Proposal Requirements

- Exhibits – Materials and Certifications to be accepted or submitted by Proposers

## 1.3 DEFINITIONS

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As used in this RFP:

**Addendum.** The term “Addendum” means a written revision to this Solicitation document, issued and posted on the Marin Transit website for all Prospective Proposers to review.

**Contract or Agreement.** The term “Contract” or “Agreement” means the Contract for mobility on-demand services entered into between Marin Transit and the successful Proposer in this procurement.

**Contractor.** The term “Contractor” means the individual, vendor, firm, company, corporation, partnership, or association executing the Contract, as the entity providing the services described in this RFP.

**Days.** The term “Days” means calendar days, unless otherwise specifically indicated.

**Federal Transit Administration (FTA).** The term “Federal Transit Administration” or “FTA” means the Federal Transit Administration of the United States Department of Transportation or its successor entity.

**Marin County Transit District (MCTD).** The term “Marin County Transit District,” “Marin Transit,” and “District” means the Marin County Transit District, which is the transit district for Marin County, California.

**Price Proposal.** The term “Price Proposal” means the portion of the Proposal submitted in response to the Request for Proposals which represents the Proposer’s total Contract price proposed.

**Project Manager.** The term “Project Manager” means the individual who is responsible for oversight of this Contract and is the point of contact for issues that arise during the Contract.

**Proposal.** The term “Proposal” means the response submitted by the Proposer, and any interview and exercise, pursuant to the issuance of this Request for Proposal.

**Proposer.** The term “Proposer” means any person or firm who submits a Proposal in response to this RFP.

**Prospective Proposer.** The term “Prospective Proposer” means any person who indicates an interest in responding to this RFP.

**Solicitation.** The term “Solicitation” means this RFP.

**Transportation Authority of Marin.** The term “Transportation Authority of Marin” and “TAM” refer to Marin County’s Congestion Management Agency.

#### 1.4 PROPOSAL TIMELINE

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Task	Date <sup>1</sup>
Request for Proposals issued by Marin Transit	October 18, 2019
Proposers’ Conference (optional) hosted by Marin Transit	October 29, 2019 at 1:00 PM PST
Deadline for receipt of written questions and requests for addenda – 3:00 p.m. PST	November 1, 2019
Marin Transit responses and addendum issued	November 8, 2019
Proposals due – 3:00 p.m. PST	November 25, 2019
Oral Interviews & Software Demo (if needed)	December 12 & 16, 2019
Contract award (anticipated)	February 2020

1. Marin Transit reserves the right to alter the dates shown above by written notice.

Potential Proposers are invited to an informational pre-proposal meeting/teleconference on the date and time specified in the proposal timeline at MCTD offices, 711 Grand Avenue, Suite 110, San Rafael, CA 94901. It will be possible to participate in this meeting via conference call. Interested parties desiring

to participate in the pre-proposal meeting via conference call must contact MCTD by 5:00 pm Friday, October 25, 2019 in order to obtain call in instructions and information.

Questions and answers from the pre-proposal meeting/teleconference as well as others received during the open question and answer time will be provided on MCTD's website (<http://www.marintransit.org/purchasing.html>). It is the responsibility of the Proposer to visit MCTD's website to obtain the question and answer information as well as any other updates posted to the RFP including clarifications and addenda.

Conference call registration and questions pertaining to this RFP, the Specifications, or the Submittal Requirements should be directed to:

Cody Lowe

Planning Analyst

415-226-0866

[clowe@marintransit.org](mailto:clowe@marintransit.org)

## **SECTION 2 – SCOPE OF WORK**

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While this RFP provides certain minimum required and optional features of the desired software, responding firms should design their submissions to offer the best opportunity to partner on this pursuit to meet the potential future needs of the District and TAM as outlined in this request. If proposers are not able or willing to meet all feature requests and still interested in submitting, areas of deficiency should be marked on the Scope of Work checklist in Exhibit C. As part of the partnership, the District and TAM would make certain commitments to supporting the service and program as outlined below and the selected vendor would provide the requested technology to best meet the requirements outlined below.

### **2.1 DISTRICT AND TAM COMMITMENTS**

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The District is seeking to continue and enhanced its current accessible shared-ride, on-demand service (Connect) which is focused on serving seniors and those with disabilities and TAM's first/last mile voucher subsidy program. It is the intent that this program can complement existing general public transit and other first-last miles programs offered in Marin County. The District intends to commit the following resources to support this service:

- Operations and maintenance of at least four, fully accessible Ford Transit vans. Operations includes daily dispatch oversight and driver support. Marin Transit intends to operate this new partnership under its current contract for demand response services (Whistlestop Wheels). It is estimated that 8,500 annual revenue hours would be allocated annually to this service, starting in FY 2020-2021. Assuming productivity levels of four passengers per hour, the District expects roughly 34,000 passenger trips annually.
- Scheduling and call center support services to assist riders with setting up accounts, scheduling trips, and customer service issues.
- Marketing and outreach to educate and promote use of the service.

TAM is interested in continuing to encourage and support transit services as an attractive commute option by offering a per ride subsidy to those in need of a first/last mile connection. In previous Fiscal Years, TAM has budgeted approximately \$70,000 annually for riders booking trips or services through

the selected platform to offset a portion of the fares for these riders. Future year expenditures are not determined at this time and subject to TAM board approval.

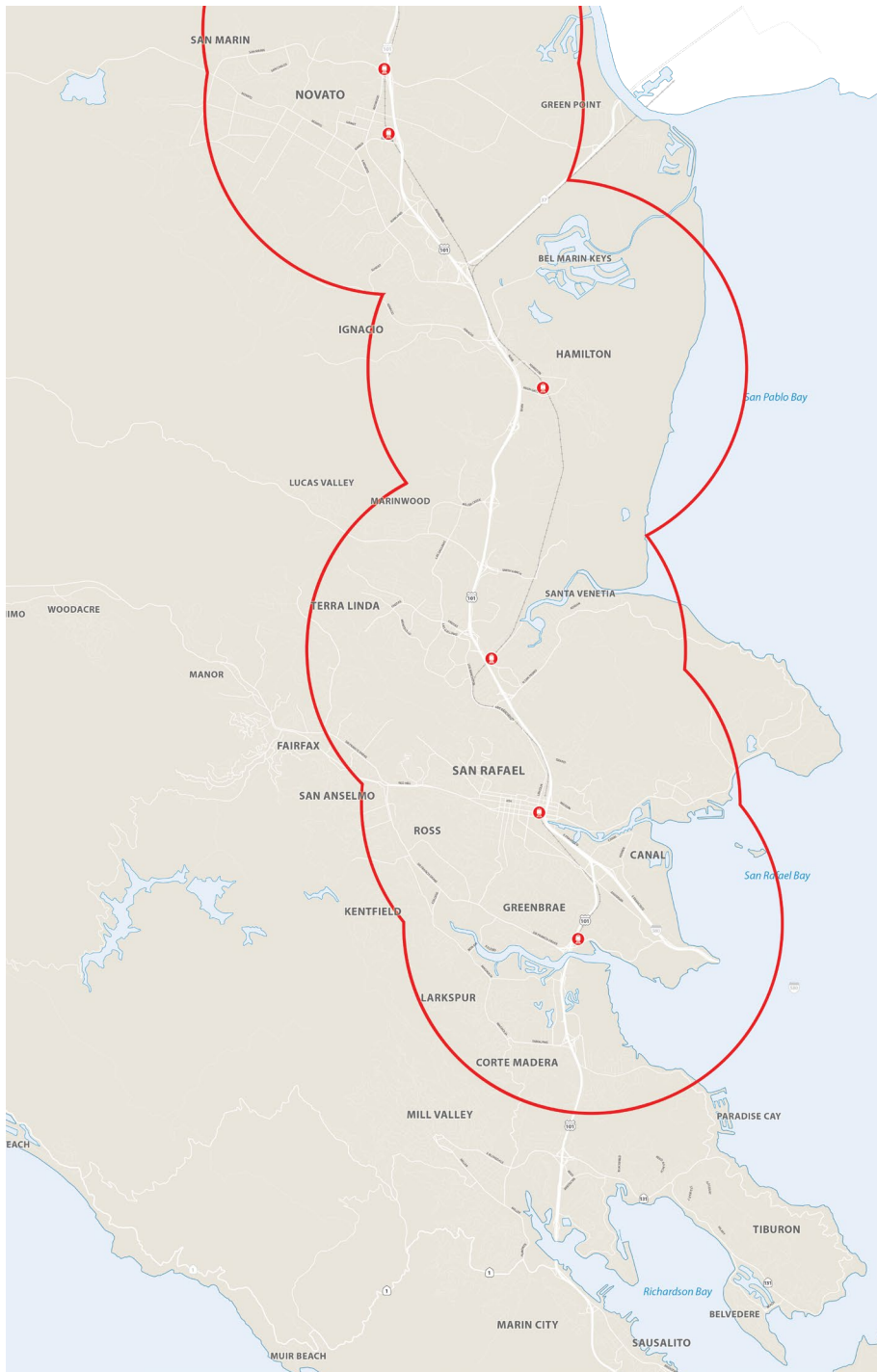
## 2.2 REQUESTED TECHNOLOGY REQUIREMENTS

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The District and TAM are requesting a technology solution to support on-demand trip requests for public transit and other possible mobility services in Marin County. While it is the hope that eventually the program could serve all the urbanized areas of Marin, bidders should assume that the initial service area is 2.5 miles from all current and future Marin County SMART stations, as shown in Figure 1. It is envisioned that this system, at a minimum would include a customer facing smartphone application, a driver facing application, a backend system to monitor and modify trip requests, and a data portal to run reports and extract data. Contractor must provide a licensed software/technology platform for up to 25 users, 50 drivers and a minimum/maximum of 4/10 vehicles. It is assumed that technical support will be available for the solution throughout the life of the agreement. Optional features have been included that are desired, but not required. The following section further details the specific technology requirements within each of these features.



**Figure 1: Proposed Service Area**



### Software & Backend System

The desired technology is software that includes shared-ride batching algorithm that matches requesting passengers to available drivers. It is envisioned that this software will be provided and maintained by the vendor and customized to the needs of the District and TAM as outlined in this RFP.

While it is assumed that the District will not have direct access to the source code, it is desired to be able to work with the selected vendor to adjust back end parameters such as maximum estimated time of arrival (ETA), deviation thresholds for shared rides, on street and off street travel speed settings, and walking thresholds for riders. Some other core features of the software shall include:

- A web-based administrative console to manage trip reservations and access driver and rider data. An interface to allow call-in reservations to be scheduled in real-time or in advance on a PC is desired;
- The ability to define a service area boundary (as shown in Figure 1) that specifies the extent to where and when a rider can book a trip on District operated services;
- The ability to automatically calculate and provide an ETA to rider once trip requests is submitted. After booking, system should continue to calculate and provide updated ETA information to rider until time of pick-up; and
- The ability to calculate the price of the trip to the rider upon trip request and/or before final trip confirmation is made. System should allow discounts to be applied price based on factors such as rider type, trip start/end location, or time of day.

*Optional Software and Backend Features:*

- *The ability to price the trip based on a flat fare for some riders and distance-based fares for other trips;*
- *The ability to associate a rider with an employer sponsored program and either directly bill employee rides to an employer account or remove payment requirements for employee rides and allow District to invoice employer for employee rides;*
- *Ability to adjust back end such as max ETAs, deviation thresholds for shared rides, on street and off-street travel speed settings, and walking thresholds for riders.*
- *The ability to integrate and show other public transit options within the system (including real-time arrivals and location) and include an integrated fare payment for transfer to and/from these services;*
- *The ability to show options for other non-District operated mobility services within the same system and allow booking to these services (e.g. TNC, taxi and/or other transit) and integrated fare payment; and*
- *The ability to directly access and control base map properties of the software.*

Customer Smartphone App

The system must provide a smart phone rider app to allow passengers, at a minimum to request trips in real time for service operated by District vehicles (as outlined above in Section 2.1). The app should be available for download from both Apple iTunes Store and Google Play Store and include the following features:

- The app shall allow a rider profile to be created that identifies special needs of the rider in terms of fare payment, vehicle type, accessibility etc.
- The app shall allow a rider to indicate a payment method, such as a credit card option, cash-payment on-board or other agency-sponsored fare payment options.
- The app shall allow the user to input various promotional or discount codes that would adjust fares accordingly

- The app shall provide the ability to track vehicle on a map within app and provide service availability forecasting.
- The app shall provide the ability to give the user updates on their trip and allow other communication to occur, either directly through the app or via SMS messaging.

*Optional Customer Smartphone App Features:*

- *The app can allow for the inclusion of Marin Transit branding*
- *The app can allow a “period pass” to be purchased for unlimited rides in a 1-day, 7-day, or 31-day period. Pass can be recognized within the system and presented to driver as visual inspection on fixed route services.*
- *The app can provide the ability to show customer estimated time of arrival at destination instead of pickup origin. For example, if a rider wants to make a connecting bus or train, the ability to book a ride based on arriving at that station in advance of a specific time.*

Driver App

The system must provide an app for use by the driver that allows trips (booked through the rider app) to automatically be dispatched to a specific vehicle. The driver app must then allow the driver to accept the trip, change/update trip status (Performed/No Show/Cancel), view rider information, and view identified payment method. Additional features of the driver app shall include:

- Audio and visual directions for driver to perform pickup and dropoff for riders;
- A user login feature, with user credentials, to be accepted that are associated specifically with Marin Transit. If the platform is used by non-District sponsored users, all requests and rides performed by Marin Transit drivers would be treated as a single account for data collection and fare reconciliation purposes;
- The ability for drivers to sign in and out of system and allow the driver to indicate a break period within the app; and
- The ability for drivers to directly communicate with riders and dispatch.

*Optional Driver App Features:*

- *Driver app can allow drivers and riders to message directly.*

Data Collection & Reporting

At a minimum, system must capture, store, and have the ability to report National Transit Database (NTD) required statistics, including, revenue vehicle hours (RVH), revenue vehicle miles (RVM), total vehicle hours (TVH), total vehicle miles (TVM), unlinked passenger trips (UPT or boardings), passenger miles travelled (PMT), and vehicles operated in maximum service (VOMS). A manual on transit agency reporting for NTD can be found here for reference: <https://www.transit.dot.gov/ntd/2019-ntd-reporting-policy-manual>

The District requests full access to the data associated with trips requested and performed within the platform that are assigned to Marin Transit operated vehicles. It is desired to have access to both the raw data and reports through a web-based graphical/dashboard mode and a quick tool for export of tabular source data into a flat file in either/both Excel and/or CSV format. If full access is not permissible, the District will require the vendor to provide customer service support to troubleshoot issues related to ride history, account information, and ride credit disputes.

Ride data shall be provided at the trip level and include:

- Requested location of pick-up and drop-off (nearest intersection or census block group)
- Actual location of pick-ups and drop-offs (nearest intersection or census block group)
- Trip length (distance and time); and
- Price of trip, including any discounts that were applied.

Driver data shall be provided at the individual driver level and include:

- Start and ends of shifts, including breaks;
- Total vehicle miles traveled (terminal to terminal); and
- Total revenue miles (miles with passengers on board).

*Optional Trip Level Data:*

- *Requested location of pick-up and drop-off (lat/long or address)*
- *Actual location of pick-ups and drop-offs (lat/long or address)*
- *Estimated and actual pickup time of trip*
- *Number of passengers on board*

*Optional rider data including:*

- *Ride history;*
- *Payment history, including use of promotional codes; and*
- *Rider profile information.*

### Technical Support

The award recipient must be able to provide Marin Transit staff and any associated contractors with training materials on how to use rider app, driver app, and the service's back end system. Ongoing support services must be provided via phone and/or email and must be available during Marin Transit operating hours. Contractor must provide Marin Transit prior notice when the software will be unavailable for any reason, such as system maintenance. Contractor must coordinate a date/time that will have the least negative impact on Marin Transit operations and customers. Contractor must indicate in price proposal if upgrades and new features to software are included or priced incrementally.

## SECTION 3 – PROPOSAL REQUIREMENTS

### 3.1 PROPOSALS

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Proposers must provide one digital copy of their response by the submittal deadline. Submittals can be emailed to the District's contact or provided through a physical submission of a flash drive that includes the digital file. Proposer must obtain confirmation of receipt from the District's contact in order to consider the response submitted.

Proposals should be prepared simply and economically and avoid the use of elaborate promotional materials beyond those sufficient to provide a complete, accurate, and reliable presentation. The response to this RFP must be made in accordance with the format set forth in this section. Failure to adhere to the following format may be cause for the District to reject the proposal as non-responsive.

Marketing collateral may be submitted to supplement proposer's written response if it assists in demonstrating the functionality of the software.

Proposals shall be organized in the following format:

#### 1) **Cover Letter**

- a) Identify the prime Contractor and describe any subcontract arrangements
- b) Identify the person who is authorized to negotiate for the team
- c) Identify the Project Manager who will be the primary point of contact for administering the Scope of Services
- d) Indicate that the Proposal represents a firm binding offer for 120 days
- e) Acknowledge receipt of all addenda by addendum number
- f) Indicate if Proposer, and/or any of its owners and/or officers, has filed (voluntarily or involuntarily) bankruptcy within the last seven years. Proposer must provide detailed information concerning such bankruptcy. Proposer must also provide detailed information on any failures to complete awarded contracts and any contract defaults or terminations

**2) Relevant Experience:** Describe your firm's experience as it relates to this Contract. Experience should reflect Proposer's knowledge of on-demand mobility software, public transportation, industry best practices and an ability to provide a high level of customer service.

**3) References:** Provide at least three relevant references including:

- i) Name and address of client
- ii) Description and terms of services provided
- iii) Name of the individual responsible for administering and monitoring the contract for the client organization, and an email address and telephone number where that person can be reached.

#### 4) **Scope of Work (including checklist—see Exhibit C)**

- a) Response shall demonstrate the proposed software can meet the requirements outlined in this RFP. Response shall specifically address if proposer's software can meet the minimum requirements and/or if proposer is planning to make planned updates or custom changes to an existing software product to meet the District's requirements. **Exhibit C must be completed to**

**indicate what requirements can be fulfilled. Any responses without a completed checklist will be deemed non-responsive.**

- b) Points will not be awarded to optional features unless the primary requirements can be fulfilled
  - c) If updates or custom development is needed, proposer shall specify the level of effort anticipated to meet the District's requirements and associated timeline to complete this development work. Proposer shall detail assumptions for developing the District configuration that includes time the proposer will need to build baseline schedules and system, along with the time commitment needed from District staff to support this process. Response can include screenshots or other visual examples of the software user interface if it helps to demonstrate software capabilities. **Note:** The District may request full functionality through a demonstration as part of the oral interviews, if deemed necessary. District staff may also request a demo account as part of the evaluation.
  - d) Response shall identify the training schedule for staff, including duration and number of staff. Specify how future training will be performed for users who do not participate in initial training.
  - e) Response shall identify the total number of users, the number of concurrent users available to access the system, the number of driver accounts, and the number of vehicles assumed.
  - f) Response shall identify acceptable system down time and how customer support is administered.
  - g) Response shall specify how the vendor will provide the client with changes to the software (updates, fixes, enhancements). The response shall address whether the vendor will provide new feature development outside the District's current requested scope as part of the fees or if these features will be priced separately and offered as separate add-on options.
  - h) Response shall specify assumptions for computer or server hardware and any external software needed to support operation of the proposed software product. Proposer should identify if these are provided as part of the proposal or if it is assumed the District will provide these supportive components. If Proposer provides them, the vendor should include costs for these components in the price proposal.
  - i) Response shall indicate how access to the requested data and reports would be obtained. Response shall provide examples of sample standard reports generated by the software as requested in the Scope of Services.
- 5) **Timeline:** Proposer shall identify an overall implementation schedule that assumes an award as late February 2020. This schedule must include network setup time, staff training, and any other mobilization tasks beginning after the contract award date. The term of the contract(s) is expected to be a minimum of two years.
- 6) **Price Proposal:** Proposer must provide a detailed price proposal showing all associated costs of the software for the duration of the contract and the billing schedule (monthly/annual/one-time).
- a) Price proposal should state start-up costs and any assumptions for costs based on vehicles, geographies, users, trips etc. If pricing is tied to a specific quantity or range, proposal must describe how changes to these assumptions would impact pricing.
  - b) Pricing should be offered for a minimum of two years and delineate between startup costs, annual costs in the first two years, costs associated with optional years (years 3-5) and any escalation associated with pricing in future years should be included. Pricing beyond the five-year period should also be provided if capable.

- c) Pricing should include any additional software or hardware components required to operate or support the operation of the software. Any and all hourly rates should be stated.
- d) Pricing should include any initial training and future training needed for new staff.
- e) Pricing should include costs associated with training and development above minimum requirements as outlined in this section. Any supplies, equipment, transportation, or other elements necessary to complete work and not addressed elsewhere in the Proposal, but that are not being provided by Proposer, must be explicitly specified. If cost estimates are available for these items, they should be included. The sources and dates of estimates should also be provided.

**7) License Agreement:** Proposer must provide a copy of their software license agreement.

**8) Required Forms:** Complete and include all the forms included in:

- a) Exhibit A (California Levine Act)
- b) Exhibit B (Non-collusion Affidavit)
- c) Exhibit C (Scope of Work Checklist)

### 3.2 QUESTIONS

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Potential Proposers are invited to submit written questions related to this proposal by email by November 1, 2019 at 3 pm PST. Questions pertaining to this RFP, the Scope of Services, or the proposal should be directed to:

Cody Lowe  
Planning Analyst  
415-226-0866  
[clowe@marintransit.org](mailto:clowe@marintransit.org)

Questions and answers received during the open question and answer time will be provided on Marin Transit's website (<http://www.marintransit.org/purchasing.html>). It is the responsibility of the Proposer to visit Marin Transit's website to obtain the question and answer information as well as any other updates to this RFP.

### 3.3 PROPOSAL SUBMITTAL PROCEDURE

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The proposal will be submitted in accordance with the following requirements:

1. The proposal will be transmitted with a cover letter as described above.
2. A digital copy of the proposal will be emailed to [clowe@marintransit.org](mailto:clowe@marintransit.org) or addressed to:

Marin Transit  
711 Grand Avenue, Suite 110  
San Rafael, CA 94901  
Attention: Cody Lowe, re: Mobility On-Demand Software

3. The proposal will be dispatched in order to be received at the above address no later than the time specified in the proposal timeline. Proposer must receive confirmation of receipt from District prior to the deadline for the submittal.

### 3.4 PROPOSAL EVALUATION AND AWARD PROCEDURE

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District staff will evaluate all written responses that fulfill the requirements of the RFP. Marin Transit may request proposers to provide a demonstration of the software and/or provide the District with an account that enables staff to test the functionality of the software. This is a most cost-effective procurement, and Marin Transit reserves the right to award to a Proposing firm other than that of the lowest Price Proposal. Evaluation of Proposals will be based on the criteria shown in the table below.

Criteria	Available Points
<b>References / Experience with Similar Agencies</b>	<b>10</b>
<b>Ability to meet Scope of Work</b>	<b>50</b>
-Demo / Training Plan / Implementation Timeline / Process	5
-Customer and Driver App Features	10
-Backend System Requirements & Reporting Features	15
-Technical Support/Customer Service/Project Management Plan	10
-Ability and Willingness to Deliver Optional Features	10
<b>Price Proposal</b>	<b>40</b>
<b>TOTAL</b>	<b>100</b>

Based on the successful award of this contract with Marin Transit, TAM reserves the right to enter into an agreement with the selected firm to provide first/last mile subsidy to transit or similar commute alternatives promotions in Marin County.

### 3.5 ADDITIONAL CONSIDERATIONS

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#### **Solicitation Disclaimer**

Marin Transit and TAM reserve the right to withdraw this RFP at any time without notice. Marin Transit and TAM reserve the right to reject any and all responses. Marin Transit and TAM reserve the right to award to other than the low-cost Proposer. All responses to this RFP become the property of Marin Transit and TAM upon submission. The costs of preparing a Proposal and participating in an interview are at the sole expense of the Proposer.

#### **Confidentiality**

The California Public Records Act (Cal. Govt. Code Sections 6250 et seq.) mandates public access to government records. Therefore, unless the information is exempt from disclosure by law, the content of any request for explanation, exception, or substitution, response to these specifications, protest, or any other written communication between Marin Transit and Proposer will be available to the public.

If Proposer believes any communication contains trade secrets or other proprietary information that the Proposer believes would cause substantial injury to Proposer's competitive position if disclosed, Proposer will request that Marin Transit and TAM withhold from disclosure the proprietary information



by marking each page containing such proprietary information as confidential. Proposer may not designate its entire Proposal as confidential.

### **Protests**

A copy of Marin Transit's and TAMs written protest procedures are available upon request.

### **Pre-contractual Expenses**

Marin Transit or TAM will not be liable for any pre-contractual expenses incurred by any Proposer, or selected Proposer. Pre-contractual expenses are defined as expenses incurred by Proposers and selected Proposer in:

- Preparing Proposal in response to this RFP
- Submitting Proposal to Marin Transit and TAM
- Negotiating with Marin Transit and TAM on any matter related to Proposal
- Incurring other expenses by Proposer or selected Proposer prior to date of award of any Agreement

Proposer will not include any such expenses as part of the price proposed in response to this RFP. Marin Transit and TAM will be held harmless and free from any and all liability, claims, or expenses whatsoever incurred by or on behalf of any person or organization responding to this RFP.

### **Verbal Agreement or Conversation**

No prior, current, or post award verbal agreement(s) with any officer, agent or employee of Marin Transit and/or TAM will affect or modify any terms or obligations of this RFP or any Contract resulting from this procurement.

### **Special Funding Considerations**

Any Contract resulting from this RFP will be financed primarily with funds available from Marin County's Measure AA Transportation Sales Tax and Marin County's Measure B Vehicle Registration Fee. The Contract for this service is contingent upon the receipt of these funds and annual budget approval of the Marin Transit Board of Directors and TAM Board of Commissioners. In the event that funding from these sources is eliminated or decreased, Marin Transit and/or TAM reserves the right to terminate any Contract or modify it accordingly.

### **Withdrawal of Proposals**

Any Proposer may withdraw his/her Proposal received by Marin Transit and/or TAM, either personally or by telegraphic or written request, at any time prior to the time fixed for receiving Proposals. Negligence on the part of the Proposer in preparing his/her Proposal confers no right of withdrawal or modification of the Proposal after such Proposal had been opened.

No Proposal may be withdrawn for a period of 120 Days after the date and time for receiving Proposals.

### **Insurance/Indemnity**

At its own expense, Contractor will obtain and maintain for the duration of the Contract insurance policies and endorsements as required by Marin Transit and /or TAM.

### **Ownership of Proposals and Data**

All Proposals and related information submitted by any Proposer, including the selected Contractor, to Marin Transit and or TAM, will become the property of Marin Transit and/or TAM. None of the material

submitted will be returned to any Proposer and may be made available under California Government Code section 6250, et seq.

All records, data, and related material collected and used in conjunction with the completion of the Agreement will be owned exclusively by Marin Transit and TAM. Proposer will not remove any records from Marin Transit property without receiving express permission to do so.

#### **Compliance with the Levine Act**

California Government Code § 84308, commonly referred to as the “Levine Act,” precludes an officer of a local government agency from participating in the award of a contract if he or she receives any political contributions totaling more than \$250 in the 12 months preceding the pendency of the contract award, and for three months following the final decision, from the person or company awarded the contract.

Proposers must submit as part of their Proposal the “California Levine Act Statement” found in Exhibit A.

#### **Governing Document**

Any item of work contained in either the RFP or the Proposal will be performed by Contractor as though it appeared in the executed Agreement. In the event of any conflict, the terms of the Agreement and the RFP govern over the Proposal unless specifically stated otherwise.

EXHIBIT A: CALIFORNIA LEVINE ACT STATEMENT

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California Government Code § 84308

**CALIFORNIA LEVINE ACT STATEMENT – MARIN TRANSIT**

California Government Code § 84308, commonly referred to as the “Levine Act,” precludes an officer of a local government agency from participating in the award of a Contract if he or she receives any political contributions totaling more than \$250 in the 12 months preceding the pendency of the Contract award, and for three months following the final decision, from the person or company awarded the Contract. This prohibition applies to contributions to the officer, or received by the officer on behalf of any other officer, or on behalf of any candidate for office or on behalf of any committee.

Marin Transit’s Board of Directors Include:

Damon Connolly  
Katie Rice  
Kathrin Sears  
Dennis Rodoni  
Judy Arnold  
Stephanie Moulton-Peters  
Kate Colin  
Eric Lucan (alt)

1. Have you or your company, or any agent on behalf of you or your company, made any political contributions of more than \$250 to any Marin Transit Board Member in the 12 months preceding the date of the issuance of this request for qualifications?

\_\_\_ YES \_\_\_ NO

If yes, please identify the director: \_\_\_\_\_

2. Do you or your company, or any agency on behalf of you or your company, anticipate or plan to make any political contributions of more than \$250 to any Marin Transit director in the three months following the award of the Contract?

\_\_\_ YES \_\_\_ NO

If yes, please identify the director: \_\_\_\_\_

Answering yes to either of the two questions above does not preclude Marin Transit from awarding a Contract to your firm. It does, however, preclude the identified director(s) from participating in the Contract award process for this Contract.

\_\_\_\_\_  
DATE

\_\_\_\_\_  
(SIGNATURE OF AUTHORIZED OFFICIAL)

\_\_\_\_\_  
(TYPE OR WRITE APPROPRIATE NAME, TITLE)

\_\_\_\_\_  
(TYPE OR WRITE NAME OF COMPANY)

**CALIFORNIA LEVINE ACT STATEMENT – TRANSPORTATION AUTHORITY OF MARIN**

California Government Code § 84308, commonly referred to as the “Levine Act,” precludes an officer of a local government agency from participating in the award of a Contract if he or she receives any political contributions totaling more than \$250 in the 12 months preceding the pendency of the Contract award, and for three months following the final decision, from the person or company awarded the Contract. This prohibition applies to contributions to the officer, or received by the officer on behalf of any other officer, or on behalf of any candidate for office or on behalf of any committee.

Transportation Authority of Marin’s Board of Commissioners Include:

Stephanie Moulton-Peters  
Katie Rice  
Alice Fredericks  
Eric Lucan  
John Reed  
James Campbell

Judy Arnold  
Kathrin Sears  
Daniel Hillmer  
Brian Colbert  
Susan Cleveland-Knowles

Damon Connolly  
Dennis Rodoni  
David Kunhardt  
Gary O. Phillips  
P. Beach Kuhl

1. Have you or your company, or any agent on behalf of you or your company, made any political contributions of more than \$250 to any TAM Board Member in the 12 months preceding the date of the issuance of this request for qualifications?

\_\_\_ YES \_\_\_ NO

If yes, please identify the director: \_\_\_\_\_

2. Do you or your company, or any agency on behalf of you or your company, anticipate or plan to make any political contributions of more than \$250 to any TAM director in the three months following the award of the Contract?

\_\_\_ YES \_\_\_ NO

If yes, please identify the director: \_\_\_\_\_

Answering yes to either of the two questions above does not preclude TAM from awarding a Contract to your firm. It does, however, preclude the identified director(s) from participating in the Contract award process for this Contract.

\_\_\_\_\_  
DATE

\_\_\_\_\_  
(SIGNATURE OF AUTHORIZED OFFICIAL)

\_\_\_\_\_  
(TYPE OR WRITE APPROPRIATE NAME, TITLE)

\_\_\_\_\_  
(TYPE OR WRITE NAME OF COMPANY)

EXHIBIT B: NONCOLLUSION AFFIDAVIT

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**Public Contract Code § 7106**

TO BE EXECUTED BY PROPOSER AND SUBMITTED WITH PROPOSAL

The undersigned declares:

I am the \_\_\_\_\_ **[PRINT YOUR TITLE]**

of \_\_\_\_\_ **[PRINT FIRM NAME]**,

the party making the foregoing Contract.

The proposal is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation. The proposal is genuine and not collusive or sham. The vendor has not directly or indirectly induced or solicited any other vendor to put in a false or sham proposal. The proposer has not directly or indirectly colluded, conspired, connived, or agreed with any proposer or anyone else to put in a sham proposal, or to refrain from proposing. The proposer has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the proposal price of the proposer or any other proposer, or to fix any overhead, profit, or cost element of the proposal price, or of that of any other proposer. All statements contained in the proposal are true. The proposer has not, directly or indirectly, submitted his or her proposal price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, to any corporation, partnership, company, association, organization, proposal depository, or to any member or agent thereof, to effectuate a collusive or sham proposal, and has not paid, and will not pay, any person or entity for such purpose.

Any person executing this declaration on behalf of a Proposer that is a corporation, partnership, joint venture, limited liability company, limited liability partnership, or any other entity, hereby represents that he or she has full power to execute, and does execute, this declaration on behalf of the proposer.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct, and that this declaration is executed on the following date:

Date: \_\_\_\_\_

Proper Name of Proposer: \_\_\_\_\_

City, State: \_\_\_\_\_

Signature: \_\_\_\_\_

Print Name: \_\_\_\_\_

Title: \_\_\_\_\_

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## EXHIBIT C: SCOPE OF WORK CHECKLIST

Please indicate whether the following required and optional features can be delivered by checking the corresponding box on each item. Additional explanation can be provided in Scope of Services response if needed. Light Gray shading and italic text indicates “optional” tasks.

Currently Exists	In Development or Willing to Accommodate	Not Willing to Accommodate	Feature
<b>System Setup</b>			
			Share-ride batching algorithm
			The need for a web-based administrative console to manage trip reservations and access driver and rider data. An interface to allow call-in reservations to be scheduled in real-time or in advance on a PC is desired;
			The ability to define a service area boundary (as shown in Figure 1) that specifies the extent to where and when a rider can book a trip on District operated services;
			The ability to automatically calculate and provide an estimated time of arrival (ETA) to rider once trip requests is submitted. After booking, system should continue to calculate and provide updated ETA information to rider until time of pick-up; and
			The ability to calculate the price of the trip to the rider upon trip request and/or before final trip confirmation is made. System should allow discounts to be applied to price based on factors such as rider type, trip start/end location, or time of day.
			<i>The ability to price the trip based on a flat fare for some riders and distance-based fares for other trips;</i>
			<i>The ability to associate a rider with an employer sponsored program and either directly bill employee rides to an employer account or remove payment requirements for employee rides and allow District to invoice employer for employee rides;</i>
			<i>Ability to adjust back end such as max ETAs, deviation thresholds for shared rides, on street and off-street travel speed settings, and walking thresholds for riders.</i>
			<i>The ability to integrate and show other public transit options within the system (including real-time arrivals and location) and include an integrated fare payment for transfer to and/from these services;</i>
			<i>The ability to show options for other non-District operated mobility services within the same system and allow booking to these systems and integrated fare payment; and</i>

Currently Exists	In Development or Willing to Accommodate	Not Willing to Accommodate	Feature
			<i>The ability to directly access and control of base map properties of the software.</i>
<b>Customer Smartphone App</b>			
			Ability request trips in real time for service operated by District vehicles.
			Available for download from both Apple iTunes Store and Google Play Store.
			The app should allow a rider profile to be created that identifies special needs of the rider in terms of fare payment, vehicle type, accessibility etc.
			The app should allow a rider to indicate payment method, such as a credit card option, cash-payment on-board or other agency-sponsored fare payment options.
			The app should allow the user to input various promotional or discount codes that would adjust fares accordingly.
			The app should provide the ability to track vehicle on a map within app and provide service availability forecasting.
			The app should provide the ability to give the user updates on their trip and allow other communication to occur, either directly through the app or via SMS messaging.
			<i>The app can allow for the inclusion of Marin Transit branding</i>
			<i>The app can allow a “period pass” to be purchased for unlimited rides in a 1-day, 7-day, or 31-day period. Pass can be recognized within the system and presented to driver as visual inspection on fixed route services.</i>
			<i>The app can provide the ability to show customer estimated time of arrival at destination instead of pickup origin. For example, if a rider wants to make a connecting bus or train, the ability to book a ride based on arriving at that station in advance of a specific time</i>

Currently Exists	In Development or Willing to Accommodate	Not Willing to Accommodate	Feature
<b>Driver App</b>			
			Automatic dispatch of requested trips to driver app and functionality to allow driver to accept the trip, change/update trip status (Performed/No Show/Cancel), view rider information, and view identified payment method.
			Audio and visual directions for driver to perform pickup and dropoff for riders.
			A user login feature, with user credentials, to be accepted that are associated specifically with Marin Transit. If system is used by other users, all requests and rides performed by Marin Transit drivers would be treated as a single account for data collection and fare reconciliation purposes.
			The ability for drivers to sign in and out of system and allow the driver to indicate a break period within the app.
			The ability for drivers to directly communicate with riders and dispatch.
			<i>Driver app can allow drivers and riders to message directly.</i>
<b>Data Collection &amp; Reporting</b>			
			At a minimum, system captures, stores, and has the ability to report <a href="#">National Transit Database (NTD)</a> required statistics, including, revenue vehicle hours (RVH), revenue vehicle miles (RVM), total vehicle hours (TVH), total vehicle miles (TVM), unlinked passenger trips (UPT or boardings), passenger miles travelled (PMT), and vehicles operated in maximum service (VOMS).
			Full access to the data associated with trips requested and performed within the platform that are assigned to Marin Transit operated vehicles.
			Access to both the raw data and reports through a web-based graphical/dashboard mode and a quick tool for export of tabular source data into a flat file in either/both Excel and/or CSV format.
			Ride Data
			Requested location of pick-up and drop-off (nearest intersection or census block group)
			Actual location of pick-ups and drop-offs (nearest intersection or census block group)



Currently Exists	In Development or Willing to Accommodate	Not Willing to Accommodate	Feature
			Trip length (distance and time)
			Price of trip, including any discounts that were applied.
			<i>Requested location of pick-up and drop-off (lat/long or address)</i>
			<i>Actual location of pick-ups and drop-offs (lat/long or address)</i>
			<i>Estimated and actual pickup time of trip</i>
			<i>Number of passengers on board</i>
			Driver Data
			Start and ends of shifts, including breaks;
			Total vehicle miles traveled (terminal to terminal), and
			Total revenue miles (miles with passengers on board).
			Rider Data
			<i>Ride history;</i>
			<i>Payment history, including use of promotional codes; and</i>
			<i>Rider profile information</i>
Technical Support			
			Provide training materials on how to use rider app, driver app, and the service's back end system
			Ongoing support services must be provided via phone and/or email and must be available during Marin Transit operating hours and meet District expectations.