



## REQUEST FOR QUALIFICATIONS & PROPOSAL

### CONTRACT PROGRAM MANAGER

**The Measure J Traffic Congestion Relief Agency (TRAFFIX) is issuing a Request for Qualifications & Proposal (RFQ/RFP) from qualified firms to provide Contract Program Manager Services for a student transportation program.**

#### PROJECT OVERVIEW

The primary responsibility of the Program Manager under this contract is to provide day-to-day oversight of the TRAFFIX Program ("Program") operations to ensure the delivery of a safe, efficient, and effective student transportation bus service that accomplishes the overarching goal of traffic congestion reduction within the San Ramon Valley.

The Measure J Traffic Congestion Relief Agency (dba TRAFFIX) operates a 23-bus student transportation service at three high schools, two middle schools, and six elementary schools within the boundaries of the San Ramon Valley Unified School District. The San Ramon Valley is comprised of the City of San Ramon, Town of Danville as well as the unincorporated communities of Alamo, Blackhawk, and Diablo.

TRAFFIX is an independent Joint Powers Authority with a 7-member Board of Directors. Day-to-day program administration is provided by a Contract Program Manager, with oversight by a Technical Advisory Committee (TAC), and community input from a Citizens Advisory Committee (CAC).

TRAFFIX is primarily funded by Measure J, the Contra Costa ½-cent transportation sales tax, authorized by the voters for the purposes of providing traffic congestion relief through capital projects and programs, and for the maintenance of the roadway system.

TRAFFIX does not maintain a physical office space and manages its operations primarily through telephone and electronic correspondence. Sale of TRAFFIX bus passes is processed via telephone or its web site, [www.RideTRAFFIX.com](http://www.RideTRAFFIX.com).



## Program Management Services SCOPE OF WORK

The primary responsibility of the TRAFFIX Program Manager under this contract is to provide day-to-day oversight of the TRAFFIX Program ("Program") operations to ensure the delivery of a safe, efficient, and effective student transportation bus service that accomplishes the overarching goal of traffic congestion reduction within the San Ramon Valley. The contract scope of work involves the following tasks (and as defined in the Program Management Services Scope of Work, provided as Attachment C):

1. **Program Administration:** This task involves providing the daily administrative oversight for the Program, which includes:

- a. *Public Interface:* Serve as the primary point of contact and the "face" of the program and to the community within the San Ramon Valley. This task involves being available - by mobile phone and e-mail - during the Program's business hours to respond in a timely manner to inquiries from the public and/or the bus service operator regarding the transportation service. Such inquiries can include both questions regarding the provision of bus service, as well as issues relating to the behavior and discipline of students being transported.

*Note:* Business hours are defined as the time period that begins when the buses are scheduled to leave the service operator's yard to the completion of all routes in the afternoon. A timely response is defined by the nature and urgency of the contact. For written correspondence, a response time of no longer than one week is sufficient. For general program inquiries communicated by telephone or e-mail, a response time of two business days is sufficient. For safety related concerns or schedule related inquiries (i.e., expected bus arrival times), the quickest available response is expected.

- b. *Budget Management:* Work with the Technical Advisory Committee (TAC) to develop an annual operating budget. Work with the Treasurer to submit and process all invoices related to the operation of the Program consistent with the Treasurer's agency protocols and timeframes.
- c. *Contract Management:* Work with the TAC to manage contracts related to the operation of the Program. Primarily, this task involves the management of the contract bus service operator to resolve any issues that may arise in the delivery of the transportation service.
- d. *Website Management and Oversight:* This task involves working with consultants to manage the TRAFFIX website. The website serves as the Program's primary

business transaction location for the purchase of bus passes, is an informational resource for customers, and serves as a repository for Program documents including meeting agendas and summaries. This task also includes updating Program information on the website such as uploading meeting schedules and Board agendas, managing consultant contracts, and working directly with consultants on maintenance and system upgrades.

- e. *Records Management*: This task involves filing and maintaining the original copies of all official records, contracts, resolutions, invoices and other documentation at the designated TRAFFIX office location within the San Ramon Valley in accordance with the California Public Records Act and for auditing purposes. This task also involves providing and responding to any public records requests for Program documents, within the timeframe established by law.
  - f. *Other Administrative Duties*: This work scope includes any miscellaneous duties associated with the oversight of the Program, including checking the TRAFFIX mailbox, via a designated physical address and/or a Post Office Box, a minimum of twice per week.
2. **Marketing and Promotion**: This task involves the development and implementation of an annual strategic marketing plan, within the framework of the approved budget, to promote the student transportation service and increase ridership. This task also involves:
- a. *Personal Interactions*: Attending school, PTA, community, and other meetings and/or venues that would allow the direct promotion of the Program.
  - b. *Advertising*: Develop and implement an advertising campaign to promote the program through print, radio, web and/or television media as funds would allow and as deemed appropriate. This work task involves coordinating with the Technical Advisory Committee and Citizen Advisory Committee to jointly promote the program.
  - c. *Public Communications*: Develop and manage a mechanism to communicate with the Program's customer base (or potential customer base) through the development of a newsletter, e-mail news blasts, press releases and any other mechanism deemed to be appropriate.
3. **Fare Collection and Management**: This task involves the oversight of the fare collection, and a pass distribution system. This task also includes working with the Treasurer to track fare revenues, issue bus passes, issue refunds, monitor the use of passes, and other related work tasks.



4. **TRAFFIX Meetings:** Work with the TAC Chair to coordinate, develop and distribute meeting agendas for TRAFFIX Board, TAC and Citizens Advisory Committee (CAC) meetings, which includes the following tasks:
  - a. *Compile and Distribute Agenda Packets:* Work with the TAC Chair to develop agendas, work with the assigned City Clerk to certify each agenda, post meeting agendas in public locations, as well as distribute the agendas and agenda packets electronically, via USPS and upload onto the TRAFFIX website.
  - b. *Meeting Facilitation:* Prepare, attend, record and facilitate all scheduled TRAFFIX Board, TAC and CAC meetings.
  - c. *Meeting Records:* Record, in audio format, all TRAFFIX Board meetings and maintain the audio record as required by law. Generate summary meeting minutes for all TRAFFIX Board and TAC meetings. The meeting records must be filed and available to the public.
5. **Program Monitoring:** This task involves a dual monitoring effort. The first effort involves working with the TAC to implement a biennial Program Monitoring effort (with a more comprehensive monitoring effort every 6-7 years) to demonstrate the effectiveness of the Program in providing traffic congestion relief. The second effort involves working with the contract service operator to monitor and regularly review the service routes for efficiency to ensure that the available buses and other resources are used in the most efficient manner given define program requirements.
6. **Program Reporting:** This task involves providing periodic status updates to various governing bodies (such as the Danville Town Council, San Ramon City Council, SRVUSD Board of Trustees, and Contra Costa County Board of Supervisors, Southwest Area Transportation Committee, and the Contra Costa Transportation Authority) and community groups (including the SRV Council of PTAs) on the status and details of the Program.
7. **Training/On-boarding:** This task consists of working directly with the current Program Manager and Technical Advisory Committee to become proficient with TRAFFIX program operations and Program Management contractual deliverables. The new contract Program Manager will be required to work directly with the current Program Manager at a minimum of 20 hours per week for a period of two months to review and transition all tasks associated with contract deliverables including Program Administration, Customer Service, Sales and Marketing, and Operations. In addition, during the first two months of the contract, the new Program Manager will be required to assist the current Program Manager with processing 2018/19 TRAFFIX bus pass sales and attend and actively participate at Board, TAC and CAC meetings.



## SELECTION CRITERIA

The firm's proposal will be evaluated based on its responsiveness and demonstrated ability to provide services outlined in the Scope of Work and its responsiveness to the RFQ/RFP. Final selection will be based on evaluating the firm's combination of experience, competencies, and ability to address the Agency's needs, as well as confirmation of the firm's status as a business enterprise with existing clients. In addition, prior to signing a contract, a firm must demonstrate that they have the required insurance; hold a valid business license in each jurisdiction; and are either: an existing Limited Partnership, Limited Liability Company or for-profit corporation, or, in the case of a sole proprietorship, have filed a fictitious business statement.

## PAYMENT FOR SERVICES

This is a 15-month service contract in an amount to be determined based on the firm's qualifications. The Contractor shall be paid for services rendered and invoiced each month, unless otherwise agreed upon between the Agency and the contractor. Proposers are expected to estimate the price for services for a 15-month period and complete Form B: Pricing Summary. Additional tasks performed not included in the scope of work defined in the Program Manager services contract are to be defined and authorized by TRAFFIX and will be considered on a case-by-case basis. Compensation for additional tasks are to be negotiated and mutually agreed upon between TRAFFIX and the Contractor and shall be executed through a contract change order process.

## TERM OF CONTRACT

The contract would be valid for one year (March 20, 2018 through June 30, 2019), with the ability to allow for two (2) one-year extensions upon mutual agreement of the Agency and the Contractor.

## INSURANCE COVERAGE

The selected Contractor shall be required to procure and maintain automobile liability of \$300,000 or greater for each occurrence and \$100,000 or greater per person for bodily injury and property damage. If the Contractor hires any employees, Worker's Compensation as required by the State of California, and Employers' Liability Insurance, one million dollars (\$1,000,000) per accident for bodily injury or disease.

## RESPONSE FORMAT

**All submittals shall include the following information:**

- 1. Form "A" - Proposer Information:** Please complete all fields listed in Form "A" describing information about the Contractor.



2. **Form "B" – Price Summary:** Please complete all fields listed in Form "B." The price summary shall include an estimate of the cost for services per year for Program Management Services, and consulting. It should also include a fee scale or hourly rate for of additional program tasks.
3. **Description of Experience and Qualifications:** Provide a description of your firm's experience. This should include any relevant information in program management services, school bus transportation, planning and routing, maintaining websites with e-commerce functionality, public speaking, database management and design, e-commerce, and or email marketing systems. Provide a summary of the work experience for all individuals who will provide work under this agreement, along with a description of their familiarity with the San Ramon Valley.
4. **Work Examples:** Provide brief description of any work performed in public transportation, education, or government service sectors.
5. **Legal Status:** please describe the legal organization of the firm, indicating the type of entity (sole-proprietorship, partnership, or corporation), the number of firm clients, and the length of its existence. In addition, copies of any current business licenses from the Town of Danville, City of San Ramon and County of Contra Costa should be provided.
6. **References:** Please provide at least three professional references (past clients or employers) relevant to this type of service.

## DEADLINE AND DELIVERY

All RFQ/RFP responses must be submitted via email in a single PDF file (preferred method to save resources) or postal mail as follows:

Measure J Traffic Congestion Relief Agency (TRAFFIX)  
c/o Andrew Dillard  
Town of Danville  
510 La Gonda Way  
Danville, CA 94526  
Email: [adillard@danville.ca.gov](mailto:adillard@danville.ca.gov)

The deadline for the submittal is **Friday, March 2, 2018 at 12:00 noon, Pacific Time.**

Submittals received after the deadline will not be accepted.



## CONTRACTOR SELECTION SCHEDULE

The successful Contractor or Firm shall be selected based on a combination of relevant past experience, qualifications and the cost proposal.

| Event  | Date                                 |
|--|--------------------------------------|
| Release RFQ/RFP  | Wednesday, February 7, 2018          |
| Proposals Due  | Friday, March 2, 2018,<br>12:00 noon |
| Interviews with Candidates                             | Wednesday, March 7, 2018             |
| Successful Contractor Selected<br>Contract Term Begins | Tuesday, March 20, 2018              |

## CONTACT

Contact with any TRAFFIX Board members, TAC members (other than the Point of Contact shown below), or the current Program Manager regarding this Request for Qualifications/Request for Proposals is prohibited and may be grounds for disqualification.

Any questions on this RFQ/RFP shall be directed to the Point of Contact:

Andrew Dillard  
Town of Danville  
E-Mail: [adillard@danville.ca.gov](mailto:adillard@danville.ca.gov)  
Phone: (925) 314-3384

List of Attachments:

- A - Form "A", Applicant Information
- B - Form "B", Price Proposal Summary
- C - Program Management Services Scope of Work



## FORM A

## Applicant Information

|  |            |                      |  |                       |          |
|--|------------|----------------------|--|-----------------------|----------|
| Applicant Last Name (if individual is applying)                    |            | Applicant First Name |  | Applicant Middle Name |          |
| Other Names Applicant is known by (if individual is applying)      |            |                      |  | .                     |          |
| Applicant Business Name (if a Contractor is applying)              |            |                      |  |                       |          |
| Applicant Business Representative Name (if Contractor is applying) |            |                      |  |                       |          |
| Applicant Address  |            | City                 |  | State                 | ZIP Code |
| Phone<br>( )   | Fax<br>( ) | Mobile<br>( )        |  |                       |          |
| E-Mail Address   |            |                      |  |                       |          |





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FORM B

Price Proposal Summary

|  |    |
|--|----|
| <b>Contract Cost</b><br>(based on 15-months) | \$ |
|--|----|



**PROGRAM MANAGEMENT SERVICES**  
Scope of Work

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| <b>PROGRAM ADMINISTRATION</b>   | Estimated % of Contract: 30% |
| <p><b>Secretary of the Board Duties</b></p> <ol style="list-style-type: none"> <li>1. Agenda Development, Posting and Distribution           <ul style="list-style-type: none"> <li>▪ Coordinate with the TAC Chair to develop the agendas, agenda packets and/or meeting notices for the Board, TAC and CAC meetings</li> <li>▪ Compile all necessary agenda packet documents into PDF file, distribute to identified meeting participants, and print meeting packets for meetings</li> <li>▪ Coordinate with the Chair Agencies to ensure proper posting of agendas in compliance with the Ralph M. Brown Act and other laws, and post agenda on website</li> </ul> </li> <li>2. Meeting Attendance and Coordination           <ul style="list-style-type: none"> <li>▪ Coordinate room availability and equipment needs (e.g., projector, computer, easels, ADA access) with the TAC Chair or designee</li> <li>▪ Contact Board, TAC and CAC members 72 hours prior to meeting to confirm attendance (and notify TAC Chair if quorum might not be reached)</li> <li>▪ Set-up meeting room (copies of agendas, speaker cards, chairs, name placards, etc.)</li> <li>▪ Record audio of Board, TAC or CAC meetings as determined by TAC Chair</li> <li>▪ Take notes of meetings, keeping track of attendance, motions and seconds</li> <li>▪ Prepare Summary of Actions for the Board, TAC and CAC meetings</li> </ul> </li> <li>3. Recordkeeping           <ul style="list-style-type: none"> <li>▪ Prepare official documents (e.g., resolutions, summary of actions) for signature by Board Chair and obtain Board Chair's signature</li> <li>▪ Maintain and organize all permanent files following the MUFFS filing system</li> <li>▪ Maintain updated spreadsheet of Board, TAC and CAC members' contact information</li> <li>▪ Check post office box twice a week or on an as-needed basis</li> </ul> </li> <li>4. Public Notices:           <ul style="list-style-type: none"> <li>▪ Prepare and mail public notices on an as-needed basis</li> </ul> </li> </ol> <p><b>Reporting</b></p> <ul style="list-style-type: none"> <li>▪ Provide written or oral reports to the Board, TAC or CAC on a regular basis</li> <li>▪ Prepare and deliver quarterly and yearly evaluations</li> <li>▪ Prepare and deliver annual update for public agency partners</li> </ul> <p><b>Finance</b></p> <ol style="list-style-type: none"> <li>1. Invoices           <ul style="list-style-type: none"> <li>▪ Prepare quarterly invoices to CCTA for Measure J funding</li> <li>▪ Collate monthly invoices and submit to San Ramon for review/ approval</li> <li>▪ Deposit funds</li> <li>▪ Process contracts/ maintain documentation</li> <li>▪ Process invoices</li> </ul> </li> </ol> |                              |

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| <ul style="list-style-type: none"> <li>▪ Disseminate checks to vendors</li> <li>▪ Track monthly revenues/expenditures</li> <li>▪ Prepare monthly Liquidated Damages report (First Student)</li> </ul> <ol style="list-style-type: none"> <li>2. Merchant Processor (Credit Card Processing)             <ul style="list-style-type: none"> <li>▪ Track account and parent transactions</li> </ul> </li> <li>3. Reports to the Board of Directors and TAC             <ul style="list-style-type: none"> <li>▪ Prepare bi-monthly reports</li> <li>▪ In concert with TRAFFIX accountants, prepare mid-year report</li> <li>▪ In concert with TRAFFIX accountants and auditors, provide information for annual Audit for TAC and Board consideration/ approval</li> <li>▪ Prepare draft annual budget for TAC and Board consideration / approval</li> <li>▪ Prepare monthly pass sales reports</li> </ul> </li> </ol> <p><b>Web Site Management</b></p> <ol style="list-style-type: none"> <li>1. Update route schedules, route maps, agenda packets and minutes, and other items as necessary on the web site</li> <li>2. Maintain the TRAFFIX database of clients and student records</li> <li>3. Provide ongoing web site maintenance and updates to enhance functionality, appearance and content</li> </ol> |                                     |
| <b>CUSTOMER SERVICE</b>  | Estimated % of Annual Contract: 30% |
| <ol style="list-style-type: none"> <li>1. <b>Service Alerts</b> <ul style="list-style-type: none"> <li>▪ Notify customers of route schedule changes, minimum day schedules, and other related service alerts by e-mail or call</li> </ul> </li> <li>2. <b>Respond to and resolve customer inquiries</b> <ul style="list-style-type: none"> <li>▪ Receive calls during operating hours (7:00 a.m. to 4:00 p.m. on school days)</li> <li>▪ Respond to email and phone inquiries within 24 hours and resolve within 3-4 days</li> <li>▪ Forward unresolved inquiries to the TAC on an as-needed basis</li> <li>▪ Maintain and prepare monthly record of incoming calls, emails and inquiries.</li> </ul> </li> </ol>  |                                     |
| <b>SALES &amp; MARKETING</b>   | Estimated % of Annual Contract: 25% |
| <ol style="list-style-type: none"> <li>3. <b>Process Annual Bus Pass Sales</b> <ul style="list-style-type: none"> <li>▪ Process new bus pass sales, and mail bus passes, and issue refunds as appropriate</li> <li>▪ Manage replacement and lost bus passes</li> <li>▪ Attend on-site sales opportunities (e.g., open house, school registrations, etc.)</li> </ul> </li> <li>4. <b>System Maintenance and Banking</b> <ul style="list-style-type: none"> <li>▪ Maintain the bus pass sales/ridership database</li> <li>▪ Process and maintain credit card transactions online</li> <li>▪ Deposit checks to bank as needed</li> <li>▪ Report updated bus pass sales sheet each month to the TAC</li> </ul> </li> <li>5. <b>Marketing</b> <ul style="list-style-type: none"> <li>▪ Develop and implement a strategic marketing plan for the system as well as targeted school site specific plans.</li> </ul> </li> </ol>   |                                     |

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| <ul style="list-style-type: none"> <li>▪ Coordinate development and distribution of marketing materials, including: brochures, pamphlets, maps, rack cards, banners and promotional items</li> <li>▪ Prepare and mail direct mail efforts as-needed</li> </ul> <p><b>6. Public Relations/Communications</b></p> <ul style="list-style-type: none"> <li>▪ Draft media communications (e.g., press releases), news articles and other marketing material as necessary to promote bus service and sales</li> <li>▪ Coordinate email communication at each school site and with the PTA community</li> <li>▪ Attend school site events/presentations as determined by TAC</li> <li>▪ Meet with principals, PTA and community members to promote the program</li> <li>▪</li> </ul>   |                                     |
| <b>OPERATIONS</b>   | Estimated % of Annual Contract: 15% |
| <p><b>1. Service Provider Contract Oversight</b></p> <ul style="list-style-type: none"> <li>▪ Oversee, manage and enforce contract with student transportation service provider</li> <li>▪ Review and approve service provider invoices within 48 hours and send to TAC Chair</li> <li>▪ Receive reports and/or submit requests to service provider for operational issues, including on-time performance, dispatch requests, bus driver and route schedule lists, and bus safety</li> <li>▪ Serve as liaison between agencies and service provider with respect to construction or road maintenance impacts to the bus service</li> <li>▪ Serve as liaison between transportation service provider and school principals for bell times and adjusted day schedules (including minimum days and conference weeks)</li> </ul> <p><b>2. Discipline</b></p> <ul style="list-style-type: none"> <li>▪ Receive discipline reports from service operators</li> <li>▪ Contact parents regarding student behavior issues, as directed</li> <li>▪ Contact school site administration to administer discipline, as appropriate</li> </ul> |                                     |