



Missoula Urban Transportation District (MUTD)
1221 Shakespeare St
Missoula, MT 59802
Phone: 406-543-8386
Fax: 406-543-8387

REQUEST FOR PROPOSALS

FOR

PARATRANSIT SOFTWARE

RFP 21-01

June 17, 2021

TABLE OF CONTENTS

Section 1: Solicitation Notice.....	3
Section 2: Scope of Work	9
Section 3: Submittal Requirements	15
Section 4: Evaluation Process and Award	16
Exhibits:	
A: Required Forms and Certifications	17

SECTION 1: SOLICITATION NOTICE

1.1 Notice

Notice is hereby given that Missoula Urban Transportation District (MUTD) has released Request for Proposals RFP 21-01 for a comprehensive paratransit software package. Proposals are due at **5:00 PM MST on Friday, July 30th, 2021.**

1.2 Communications with MUTD

Upon release of this solicitation document, all communications concerning this procurement must be directed to:

Dan Stone
Transit Planner
Missoula Urban Transportation District
1221 Shakespeare St, Missoula, MT 59802
dstone@mountainline.com
406-215-2457

Unless authorized by the General Manager in writing, no other MUTD official or employee is empowered to speak for MUTD with respect to this Request for Proposals (RFP).

1.3 Submission of Proposals

Proposals shall be prepared as described in Section 3 of this RFP.

Submissions shall be sent via email in PDF format to Dan Stone, Transit Planner, at dstone@mountainline.com.

1.4 Schedule

RFP Issued: June 17th, 2021

Pre-Bid Meeting (Virtual): July 1st, 2021, 2 PM MST

Clarifications/Questions Due: July 14th, 2021

MUTD Responses to Clarifications/Questions: July 16th, 2021

Proposals Due: July 30th, 2021, 5PM MST

Interviews (if necessary): August 9th & 10th, 2021

Notification of Selected Supplier: August 20th, 2021

Board Approval: August 26th, 2021

Notice to Proceed: October 1st, 2021, or earlier

1.5 Nonresponsive Submittals

MUTD reserves the right to reject as non-responsive any submittal which is incomplete, obscure or irregular, or from Offerors who have previously failed to perform properly, or to complete on time, contracts of any nature. MUTD reserves the right to reject any or all submittals, based on its discretion alone.

1.6 Late Submittals, Modifications of Submittals, and Withdrawals of Submittals

A modification of a submittal already received will be considered only if the proposed modification is received prior to the established deadline. Any submittal or modification received at the office designated in the solicitation after the exact time specified for receipt will be considered non-responsive and will be returned to the Offeror not opened.

The time of receipt at MUTD is the time-date stamped on the email or submittal envelope, or other documentary evidence of receipt maintained by MUTD.

Submittals may be officially withdrawn from consideration only by a written request to MUTD's point of contact as identified in Section 1.2 prior to the response deadline.

No Offeror may withdraw its submittal after the time announced for submitting or before the award and execution of the contract, unless the award is delayed for a period exceeding ninety (90) days.

1.7 Pre-contractual Expenses

MUTD will not be responsible for any expenses incurred in preparing, submitting, or negotiating this proposal, and such costs should not be included in the proposal.

1.8 Pre-Bid Meeting

MUTD staff will be available to answer questions from offerors during a pre-bid meeting on Thursday, July 1st, 2021, at 2 PM MST. The meeting will be conducted only by video and telephone conference; a physical meeting location will not be provided. Questions, comments, and concerns can be submitted verbally by telephone or through the written chat feature of the conferencing software.

Participation in this meeting is optional. A video and audio recording of the meeting will be made available on the MUTD website directly following its conclusion.

The meeting can be accessed in the following ways:

Computer or Mobile App (Video and/or Audio):

<https://us02web.zoom.us/j/83314287174?pwd=NW1FNXpldUFVazA5bVl3SENpVFZpZz09>

Meeting ID: 833 1428 7174

Passcode: 720014

Phone Only:

Dial by your location

- +1 253 215 8782 US (Tacoma)
- +1 346 248 7799 US (Houston)
- +1 669 900 6833 US (San Jose)
- +1 301 715 8592 US (Washington DC)
- +1 312 626 6799 US (Chicago)
- +1 646 876 9923 US (New York)

Meeting ID: 833 1428 7174

Passcode: 720014

1.9 Requests for Clarification or Approved Equals

All requests for clarifications, explanations, changes, substitutions, or approval of items equal to items with specified brand names must be submitted via email to the officer listed in Section 1.2 using the form in Exhibit A, and no later than the date listed in Section 1.4.

MUTD will provide a single written response to all properly submitted requests for clarification or approved equals as addendum on or before Wednesday, July 14th, 2021. All addenda will be posted on the MUTD website at www.mountainline.com.

1.10 Acknowledgement of Addenda

Please send an email to dstone@mountainline.com to state your interest in submitting a proposal and to receiving any issued addenda.

While MUTD will make efforts to provide addenda to all interested parties, it is the Offeror's responsibility to ensure that they have received and understand any and all addenda issued.

A completed 'Addendum Acknowledgement' form (Exhibit A) shall be included with all proposals.

1.11 Protest Procedures

Grounds for Protest

A protest with may be filed by any interested party on the grounds that MUTD has:

- Failed to comply with its procurement procedures;
- Failed to comply with the terms of the solicitation in question, including the failure to adhere to the evaluation criteria set forth in the solicitation, if applicable;
- Issued restrictive or discriminatory specifications; or,
- Made an award to other than the lowest responsive and responsible bidder on formally advertised procurements.

Protest Contents

Written protests should be concise, logical, and clearly state the grounds for the protest. They must include the following information:

- Name, address, and telephone number of protestor
- Identification of the solicitation or contract number
- A detailed statement of the legal and factual grounds of the protest including copies of relevant documents
- A statement as to what relief is requested.

All protest documents received by the General Manager shall be stamped with date and time received and logged into a file folder with a copy to the Master File.

Pre-Bid and Pre-Award Protests

Protests addressing the solicitation process or the solicitation documents, including the specifications, must be received by the General Manager within seven (7) calendar days of the decision to award a contract. Thereafter, any protest based on such grounds will not be considered.

Post-Award Protests

Protests addressing the approval or award, including the evaluation of bids or proposals, must be received by the General Manager within five (5) days after the decision to award a contract. Thereafter, any protest based on such grounds will not be considered. MUTD will notify all unsuccessful bidders or proposers of its intent to award a contract at the same time it notifies the successful bidder or proposer.

Protest Response

MUTD will notify the protestor within 3 days of receipt that the protest is being considered. Upon receipt of a timely protest regarding the solicitation process, MUTD will postpone the opening of bids until resolution of the protest. The filing of the protest will not, however, change the date on which bids are due, unless otherwise noticed.

Upon receipt of a timely protest regarding the evaluation or award, MUTD will suspend contract approval or other pending action until resolution of the protest, unless the General Manager determines in writing that:

- The items to be procured are urgently required; or
- Delivery or performance will be unduly delayed by failure to make the award promptly; or
- Failure to make prompt award will otherwise cause undue harm to MUTD or the State or the Federal Government.

Protest Decision

The decision of the General Manager shall be issued in writing within fourteen (14) days of receipt of the protest and shall be the final binding agency action. If the protest is upheld, MUTD will take appropriate action to correct the procurement process, such as a re-solicitation, revised evaluation, or termination of contract. If the protest is denied, MUTD will proceed with its procurement process.

The Federal Transit Administration will only entertain a protest that alleges the District failed to follow their protest procedures and such a protest must be filed in accordance with FTA Circular 4220.1F.

1.12 Disadvantaged Business Enterprise Participation

The Disadvantaged Business Enterprise (DBE) requirements of 49 CFR Part 26 applies to this contract. The requirements of this contract are to encourage DBE participation and to report race neutral accomplishments semi-annually. No preference will be included in the submission evaluation, no minimum level of DBE participation shall be required as condition for receiving an award and submissions will not be rejected or considered non-responsive on that basis.

1.13 Public Disclosure of Information

All the information contained in the submittal is subject to the State of Montana public disclosure laws. If an Offeror feels that any information is confidential or proprietary in nature, the Offeror must submit all such information in a separate sealed envelope prominently marked with the Offeror's name and "Exempt from Public Disclosure". MUTD shall not release or divulge such information to third parties without the consent of the Offeror unless required to do so by applicable law or order of a court of competent jurisdiction.

MUTD assumes no responsibility or liability for any losses or damages which may result from the information contained in the submittal. Furthermore, it will be the responsibility of the Offeror to protect the confidentiality of any information submitted in the submittal, and the Offeror will assume all liability and responsibility for any information declared confidential and shall defend and hold MUTD harmless for any cost, penalties, and/or fees (including attorney fees) incurred in any action regarding the disclosure of said information.

1.14 Federal Clauses and Requirements

MUTD receives funding from the Federal Transit Administration to assist with transit operations and capital expenses. As such, third party contracts involving the use of federal funds are subject to applicable federal requirements. A full listing of these requirements can be found at <https://madmin.windfall.tools/wp-content/uploads/2017/07/MUTD-Federal-Clauses-and-Certifications Master July-2017.pdf>

SECTION 2: SCOPE OF WORK

2.1 Overview

Missoula Urban Transportation District (MUTD) is requesting proposals from qualified firms to provide a comprehensive software solution for the management of paratransit and demand response transportation. The proposed solution will streamline the management of client records, enhance statistical reporting processes, and improve the efficiency and effectiveness of MUTD’s demand response operations by automating dispatching and scheduling tasks.

At a minimum, the system will include:

- Secure, cloud-hosted/SaaS administrative software that features scheduling, dispatching, and client database modules that can be accessed through a web browser from any internet-enabled device. Software should be intuitive, easy-to-use, feature a clean user interface, and reduce the need for manual data entry and duplication of data.
- A self-service customer web portal that allows clients and caregivers to apply for paratransit eligibility, book and manage reservations, and update personal information.
- Mobile Data Terminals (MDTs) and associated mounting hardware, cables, and communication components for MUTD’s entire demand response fleet.
- Mobile app for iOS and Android devices that features real-time passenger information and trip reservation capabilities.

2.2 MUTD’s Demand Response Services

MUTD currently operates two zero-fare demand response services: ADA paratransit, and a reservation-based Shuttle Van service that is available to seniors who do not qualify for ADA paratransit service. MUTD requires a software solution that fully supports and ensures the seamless operation of both services. While not a requirement of this solicitation, a system that could be adapted for microtransit or other on-demand services is preferred.

MUTD’s Demand Response Fleet

Year	Make	Model	Vehicle Type	Quantity
2014	Arboc	Spirit of Freedom	Cut Away	2
2017	Toyota	Sienna	Minivan	2
2018	Champion	LF Transport	Cut Away	1
2018	Eldorado	Amerivan	Accessible Minivan	1
2018	Braun	BraunAbility	Accessible Minivan	1
2018	Eldorado	Entervan	Cut Away	1
2019	Elkhart Coach		Cut Away	4
2019	Braun	BraunAbility	Accessible Minivan	3
2019	Dodge	Caravan	Accessible Minivan	1
			Total Vehicles	16

2.3 Scheduling and Dispatching Software – Technical Specifications

2.3.1 Client Management

Paratransit Application

- The software shall include a customer-facing paratransit application module that allows clients, caregivers, or care facilities to apply for paratransit eligibility through any web browser.
- The application module will be easy to navigate and meet ADA accessibility standards.
- To reduce the need for manual data entry, the paratransit application module should be linked to the customer database and new client records should be automatically created upon application approval.

Customer Database

- Database initialization
 - The selected firm will be responsible for accurately migrating existing customer records to the new customer database.
- Client information
 - The client database shall include a range of customer attribute information including name, age, date of birth, address, contact information, gender, mobility type, attendant information, emergency contacts, disability type, required accommodations, load and unload time, and demographic categories (e.g. elderly, disabled, youth, low-income).
 - Individual customer records shall include a field for client-related notes and comments.
 - The system shall track customer cancellations and no-shows.
 - Customer records should be easily searchable by name, contact information, or customer attributes. Autocomplete search capabilities and the ability to quickly filter client records by eligibility status or attribute information are preferred.
 - The system shall allow for real-time customer record updates.
 - Customer database will include trip details and history specific to each client such as trip origins, destinations, and dates.
- Paratransit eligibility
 - The customer database shall allow for the assignment of different eligibility levels.
 - The software should track customer eligibility status and automatically notify MUTD and clients of upcoming eligibility expirations.
 - The system should automate correspondence with clients through text messages, emails, or pre-recorded phone calls regarding eligibility approvals, expirations, denials, or appeals.
 - The ability to automatically generate mailing labels for client notifications is preferred.
 - MUTD staff shall have the ability to temporarily suspend a customer's eligibility. During the suspension period, the system will not allow trip booking for that customer.

2.3.2 Trip Reservations and Scheduling

Self-Service Reservation Portal

- An online trip reservation module shall allow clients, caregivers, and MUTD staff to easily view, create, modify, or cancel trips.
- The reservation module will feature a clean, intuitive interface that is easy to navigate.
- Accessible booking options for customers with hearing or visual impairments will be available.

Trip Booking

- The system shall be capable of booking same-day trips, scheduling standing-order (subscription) trips, and accepting advanced reservations of up to 365 days prior to the requested trip date. Standing-order trips will be able to be scheduled on a weekly (e.g. every Monday) or monthly (e.g. first and third Monday) basis, and MUTD staff shall be able to temporarily suspend standing-order trips without needing to modify trips outside of the suspension period.
- The system should be capable of booking trips based on pickup time or arrival time. When scheduling by arrival time, the system shall automatically factor in travel time from origin to destination.
- When booking trips, trip reversals or return trips from destination to origin should be automatically generated.
- Attendants or caregivers should be able to be added to the trip reservation.
- The system shall be capable of storing a customer's most frequent trip origins and destinations for quick selection during booking.
- Safeguards that prevent errors such as past date booking, duplicate trips, and booking clients with expired applications will be in place.

Trip Optimization

- The software shall feature automatic trip optimization. Trips will be continuously updated and adjusted based on vehicle position, trip cancellations, and no-shows. Automatic trip optimization shall maximize service efficiency while reducing the need for manual schedule adjustments.
- The ability to manage unexpected en route origin and destination changes is preferred.
- Trips to or from same origins or to same destinations shall be combined to eliminate duplicate trips.

Scheduling

- Schedules shall be displayed in an intuitive manner that shows individual trips and service gaps, and dispatchers shall be able to manually arrange trips and modify times when needed. Manual trip changes will feature visual drag-and-drop adjustments that eliminate the need for additional data entry.
- Scheduling changes shall automatically be synced to vehicle MDT's.
- Automatic scheduling should account for trip dwell times and travel times based on street networks and time of day.
- The software will allow dispatchers to easily manage no-shows, cancellations, and on-time performance. No-shows and cancellations shall automatically sync to operator MDTs and trip schedules will be updated accordingly.

- The system shall provide riders with automatic trip notifications and updates through phone calls, text messages, and/or emails, and passengers should be automatically notified the day before a scheduled trip.
- The system shall allow for batch scheduling, the ability to duplicate multiple trips for different days, and allow for simultaneous changes to recurring trips that are not standing orders. The ability to copy the same trip for different customers is preferred.
- The software will feature operator scheduling capabilities that automatically account for operating hours, breaks, and labor rules.

2.3.3 Dispatching

- The dispatching module shall display vehicle locations, scheduled arrival times, real-time arrival predictions, vehicle numbers, client names, and the number of passengers per trip. Visual on-time performance indicators are preferred.
- Vehicle locations will be displayed on a detailed map using an API from Google Maps, Mapbox, or other commonly used, frequently updated web mapping services. Vehicle locations shall be updated a minimum of every thirty seconds.
- Vehicle assignments will be automatically updated if a vehicle needs to be pulled from service or if a vehicle is running late.
- The system shall offer two-way text messaging from dispatch to operators. Messages should be saved or archived in the system for future reference.
- The system shall send automatic text or phone notifications to clients as a bus approaches a location for a pickup.
- The option for the future deployment of a VOIP system is preferred.

2.3.4 Reporting

- The system shall include a reporting module that meets all National Transit Database requirements and allows for the quick analysis of performance and service metrics such as:
 - Service hours and miles
 - Deadhead hours and miles
 - Ridership
 - On-time performance
 - Trip origins and destinations
- The ability to run reports based on service type (e.g. Paratransit or Shuttle Van) and service days (weekday, Saturday, or Sunday) is required.
- The software will feature the ability to run custom reports using any of the data elements included in the database. Custom reports should be intuitive and require minimal user configuration.
- Reports shall be exportable as pdf, Word, Excel, and GIS data formats. Origin and destination reports should export location addresses as well as geocoded coordinates.

2.3.5 Mobile App

- The offeror shall provide a mobile app for iOS and Android devices that is free to use and allows MUTD customers to view, book, modify, or cancel trip reservations.

- The app shall allow users to receive notifications about trip updates and estimated pickup and arrival times.
- In-app maps will display real-time vehicle location and pickup and drop-off locations.
- The mobile app shall be intuitive, easy to use, and meet ADA accessibility standards.

2.3.6 Mobile Data Terminals (MDTs)

MDTs will include, at a minimum, the following features:

- Waterproof, shock-proof, durable construction that can withstand the rigors of daily transit use.
- Internet-enabled through a wireless LTE network. MUTD has existing LTE service through Verizon and will be responsible for managing the wireless service contract.
- Navigation capability including map displays and turn-by-turn directions to pickups and destinations. The navigation feature will include hands-free functionality and voice annunciated directions. Display maps shall use a Google Maps API or other commonly used, frequently updated web mapping service.
- Two-way text messaging to dispatch that includes canned and customizable messages. Messaging features shall be disabled while the vehicle is in motion.
- Real-time data communication. MDTs shall pull driver manifests from the server and automatically sync with trip updates and schedule changes made by MUTD dispatch.
- Manifest display. Manifest information will be pulled from the server upon driver login and will automatically update when trips are completed or when manifest changes are made by dispatch. Drivers shall be able to easily view passenger and trip information.
- Real-time GPS vehicle location including speed and direction.
- Odometer and mileage tracking.
- Visual on-time performance indicators.

2.4 System Installation & Deployment

Proposals shall include a deployment schedule that outlines the number of weeks from Notice to Proceed to project completion and meets the following deployment requirements:

2.4.1 Pilot Program

The project plan shall include a pilot installation on 2 vehicles within 30 days of Notice to Proceed as a precondition for full system deployment. MUTD will give the approval to move forward with full system installation only after a successful deployment of the pilot program.

The pilot installation shall observe the following schedule:

- Installation of hardware and software within 30 days of Notice to Proceed.
- A two-week test period to ensure full functionality of the system.
- Two weeks to correct any issues with the system.

2.4.2 Full-System Implementation

- A fleet-wide installation of system hardware and software will occur within 180 days of MUTD's approval following a successful pilot program.

- Following fleet-wide installation, the vendor will be given 30 days to test and troubleshoot the system and 90 days to fix any issues.

1.5 Training

The selected vendor shall offer comprehensive on-site training to MUTD staff on all provided hardware and software. Digital copies of user manuals, training materials, and all other system documentation will be made available to MUTD staff. A training module that is built into the base system and allows for future training of MUTD staff is preferred.

2.6 Warranty & Customer Support

The initial contract shall include a warranty of a minimum of one (1) year for all hardware and software beginning at final acceptance and pricing for the first five (5) years of maintenance and support. Additionally, the vendor shall provide service contract requirements and anticipated costs beyond the initial five (5) year contract.

MUTD expects a high level of customer service and product support from the vendor and requires that any issues with the system be resolved in a timely fashion with minimal system downtime. The vendor's customer support should be available between the hours of 7AM to 7PM (MST), 7 days a week. If hardware failures occur, replacement parts should be readily available and able to be obtained quickly.

The selected vendor shall make parts and components available for repairs and replacements through the useful life benchmark of each vehicle the system is installed into.

2.7 Service Levels

MUTD requires that the system and services provided by the vendor shall be available 99.9% of the time, excluding scheduled maintenance and downtime resulting from outages of third-party connections or utilities. For each period of downtime lasting longer than 30 minutes, MUTD will request a credit that shall be calculated as 5% of the total monthly service fee. Service credits will be limited to once per day. Downtime shall begin to accrue as soon as MUTD recognizes that downtime is taking place and will continue until the availability of the services is restored. MUTD will notify the vendor within 24 hours from the start of downtime, and failure to provide such notice will forfeit the right to receive downtime credit.

SECTION 3: SUBMITTAL REQUIREMENTS

3.1 Submittal Requirements

To be considered for this project, vendors must have a proven track record of implementing paratransit and demand response software solutions for transit agencies. Vendors shall submit a proposal that includes the following information:

- A brief overview of the company including history and number of years in business.
- Qualifications and experience in implementing similar projects.
- A detailed work plan that outlines how the company plans to fulfill the Scope of Work.
- Description of all hardware and software needed to fulfill the Scope of Work.
- Anticipated timeline for the completion of all required work.
- Indicate to what extent the proposal meets each requirement listed in Section 2.3 of the Scope of Work, (e.g. 'meets', 'does not meet', 'partially meets'). Provide an explanation of each deficiency and/or a description of an approved equal.
- Key personnel who will be involved with the project.
- Three client references, including point of contact, agency name, address, and phone number.
- Documentation of any history of litigation associated with project performance and/or professional liability.
- Documentation of the firm's financial standing and insurance coverage.
- Exhibit A: Pricing Proposal Form.

3.2 Pricing

Offerors shall provide pricing for all items outlined in Exhibit A: Pricing Proposal Form and provide supporting documentation of all costs needed to fulfill the Scope of Work.

SECTION 4: EVALUATION PROCESS AND AWARD

4.1 Evaluation Committee

Evaluations will be performed by a committee comprised of MUTD staff. The evaluation committee will evaluate and select the proposal that best addresses the requirements of the project, in accordance with the criteria stated herein. MUTD reserves the right to reject any or all submittals.

4.2 Evaluation Criteria

Each proposal will be evaluated based on the following factors:

Factor	Relative Weight
Responsiveness to technical specifications outlined in the Scope of Work, and vendor qualifications, experience, and references	Most important
Price	Very Important

4.3 Selection Process

The responses to this solicitation will be evaluated based on their ability to meet MUTD's needs. The responses will be evaluated according to the criteria above by the selection committee, and the selection committee will make a recommendation to the MUTD Board of Directors to authorize the General Manager to execute a contract with the selected firm.

If agreement cannot be reached with the selected firm, MUTD will terminate negotiations with that firm and open negotiations with the next ranked firm. The compensation discussed with one firm will not be disclosed or discussed with another firm.

Exhibit A:

Required Forms and Certifications

For a proposal to be considered responsive, the following forms, certifications, and/or statements are to be executed and enclosed with each proposal. Proposals received without these forms/certifications completed will not be considered. Compliance with these requirements is mandatory for a contract award.

MISSOULA URBAN TRANSPORTATION DISTRICT

ADDENDUM ACKNOWLEDGEMENT

Proposer/Bidder acknowledges receipt of the following addenda which are attached to the proposal/bid:

Addendum No. _____ Date _____

Addendum No. _____ Date _____

Addendum No. _____ Date _____

Addendum No. _____ Date _____

Addendum No. _____ Date _____

Failure to acknowledge receipt of all addenda may cause the proposal to be considered non-responsive and omitted from consideration.

Pricing Proposal Form

Year 1 Costs

	Item	Unit Price	Total Cost
Software	Complete software package including customer portal and scheduling, dispatching, and client database modules		
	Year one software maintenance and hosting		
	Other software		
Mobile App	Mobile app setup and configuration		
	Year one software maintenance and/or hosting		
	Other mobile app fees		
Hardware	Mobile data terminals (MDTs), mounting hardware, and all other components required for a complete vehicle installation. Provide cost-per-vehicle.		
	Other hardware		
Labor	Software and hardware installation		
	System configuration		
	Project management		
	Direct costs (travel, per diem, etc)		
	Technical support		
	Other labor		

Total Year 1 Cost	
--------------------------	--

Recurring Costs

	Year 2	Year 3	Year 4	Year 5
Software maintenance and/or hosting				
Mobile app maintenance				
Technical support				
Other recurring				

Total years 2-5 recurring costs	
--	--

Total Project Cost

Total project cost (Year 1 cost + years 2-5 recurring costs)	
--	--