

## 5. SECTION B - SCOPE OF SERVICES:

### 5.1. Background

In September 2020 Montgomery County Department of Transportation implemented on-demand transportation flex services. Following a successful Proof of Concept, the County intends to expand service, from the current 2 zones. The Contractor will partner with the County in the service design and expansion (to include schedule), development, replacing the existing services and systems to accommodate changes proposed in the “Requirements”, regulation, and new processes.

### 5.2. Intent and Objectives

Montgomery County Government, Maryland – Department of Transportation: Division of Transit (MCDOT/The County) has the need for a transportation software company to continue and expand the current Ride On Flex program. This is an on-demand ride sharing transit technology service for Montgomery County residents.

The County is seeking an on-demand transit solution, fully capable and ready to serve Montgomery County riders (matching the present level of services) Day 1. The intent is to then expand services (zones), up to a maximum of 15. This expansion will occur in a manner and cadence agreed upon by both parties.

The County would like the contractor proposal to be priced for the following scenario:

- The County supplies the buses and operators.
- The Contractor supplies the mobile App, end-point technology, back-end technology, customer contact system and staff (i.e. Call Center)

***Note: The County acknowledges those systems supplied by the Contractor to be the sole property of the Contractor (unless otherwise agreed upon). However, ALL data is the sole property of The County and must be turned over at the completion of the agreement or, as demanded by The County (within 30-calendar days).***

### 5.3. Scope of Services/Specifications/Work Statement

- A. The Contractor will provide to the County on-demand transit ride request technology services.
- B. These services consist of on-demand transit ride services on commercial transit vehicles. Rides are requested and payments are made at the farebox. All Ride On fare policies apply.
- C. The services and associated geographic boundaries are expressed in “Zones.” The zones cover specific regions within the county and in the application, all the technology, equipment, and personnel to produce services within a zone must be able to be scaled to cover other geographic regions within the County.
- D. The Contractor will work with the County in the planning, design, and release of new Zones.

- a. Ride On Reimagined – The current “Ride On Reimagined” Assessment is well-underway, with the next significant information release is scheduled for September 2024, AFTER the expiration of available initiative lag time.
- b. Council of Governments (COG) Assessment – The Assessment, scheduled for six (6) months, has only recently kicked-off and is slated to continue through September 2024 at a minimum. Again, this critical deliverable transcends Requirements Capture Closeout.

MCDOT has included all requirements based on current knowledge and data, however the results of Ride On Reimagined and the Council of Governments assessment could affect the service zones and schedule based on continual study and statistics of ridership.

- E. The County is seeking the following items as part of this RFP:
  - i. A full description of the Cloud-based Technology Solution the Contractor is proposing.
  - ii. An implementation schedule with an anticipated recommended Notice to Proceed (NTP) To Be Determined.
  - iii. List the specific work instructions/knowledge artifacts that will be delivered along with your proposed solution.
  - iv. Acknowledgement the hours of operation for each zone will initially be the same or different with some overlap time. A zone’s hours of operation are subject to change.
  - v. Estimated level of effort to implement additional zones. Please list the steps the County should be considering in the implementation of additional zones, as well as the cost of implementing each additional zone.
  - vi. The Vendor, as experts in the transit industry, may provide input and recommendation on best practice in all aspects of the operation to include:
    - i. Vehicles (e.g., type, features, et al)
    - ii. Hardware and equipment (vehicle and technology)
    - iii. Support Services (Model and Approach)
    - iv. Technology Availability (Redundancy)
    - v. Financial (Disbursement, Reconciliation)

Note: Any alternative approaches submitted in response to section E.vi, must:

- Clearly state the approach being described is “Alternative”
- Include in the description the benefit to Montgomery County and it’s riders
- Explain how the impact of implementing the alternative approach is either neutral, or increases or reduces the cost of the service to the County (if the approach decreases the cost to the County, explain WHEN the benefit is realized)

#### **5.4. Contractor’s Qualifications**

The Contractor must have a minimum of 5 years of successful history and at least four (4) similar projects of the Contractor’s partnership with a transit agency that are currently in service and that feature comparable service elements.

The Contractor must comply with all Federal, State and County licensing requirements.

## Performance Standards

After an initial Transition-in period of 60-days, the Contractor adheres to the following Performance Standards:

- PS 1 - Call center/Transit operations available and responding to requests as scheduled.
- PS 2 – Contractor will maintain staffing available to respond to all requests during published business hours.
- PS 3 – Callers to the call center will receive live agent assistance (if placed in queue, must be assisted by live agent within 3-minutes).
- PS 4 – Contractor will dispatch bus to correct location on first attempt when supplied accurate location information.
- PS 5 – All service-related queries will receive an accurate and timely ( $\leq$  1-hour) answer.
- PS 6 – Average wait time for rider pick-up will not exceed 10-minutes beyond scheduled time.
- PS 7 – Contractor will provide ALL customers who contact Contractor call center, web site or email address an opportunity (voice, link, or pop-up) to respond to a customer satisfaction survey.
- PS 8 – Contractor will maintain an on-average Customer Satisfaction score of 80-percent positive or better.
- PS 9 – Contractor will conduct root cause analysis on ALL complaints and share the results with the County.

## 5.5. Contractor's Responsibilities

The Contractor must:

### A. Provide a platform infrastructure consisting of:

- i. App, web, and call-based shared ride request solutions
  1. Contractor must provide the County access to the App and web technologies in-order to place emergency announcements related to near-term closures or events of critical importance.
  2. Initial demonstration at NTP +30.
  3. Final due at NTP +45
- ii. Real-time display of vehicle location with estimated time of arrival
- iii. A pairing algorithm tailed to maximize existing capacity of the County vehicles
- iv. Device for driver console that will host the Contractor's bus driver software
- v. All Contractor-supplied technology must be ready for testing and training by NTP +45

### B. Service Management

- i. Points of contact between the County's Flex program Manager and the service provider
- ii. Provision of brand images for purpose of marketing prior and during the service
- iii. Customer service helpline available by phone and internet
- iv. Customer Support Staff for first level customer questions/issues
- v. Software updates
- vi. Training for Administration/report generation, Customer Support, Central Dispatch and Driver

### C. Data Sharing and Reports

#### **Data**

- i. Complete details of the trip data will be made available (time and location of pick up and time and location of drop-off) on a daily basis in a machine-readable format.
- ii. Names and Contact Information of service users and/or;
- iii. The ability to push notifications directly to users' phones in the event of service failure, holiday closures, etc.
- iv. Complete detail of the Operator shift including time in service, breaks, locations, etc.

#### **Reports**

At a minimum, provide the capability for the County to generate its own reports from the data for the following type of reports:

1. Daily/Weekly/Monthly/Annual (i.e., provide for report based on a date range) report showing Ridership by zone, time, and cumulative total of:
  - a. Requested Rides
  - b. Completed rides
  - c. Cancelled/No show
  - d. Proposed rides not accepted
  - e. Seat unavailable to accommodate a requested
  - f. Average trip time
    1. average trip hours
    2. passenger per hour
    3. average trip times minutes
    4. average wait time per trip
    5. percent shared trips
    6. percent recurring trips
  - g. Rider profile and history
  - h. Administrative Reports
    1. Rider Utilization of services
    2. Driver Information
    3. Vehicle information
  - i. Performance standard reports
    - Call Center availability
    - Staff availability (minimum staffing levels)
    - Wait times in excess of 3-minutes
    - Multiple dispatches for same rider
    - Failed responses to customer queries (incorrect information supplied or beyond one hour to respond)
    - Average number of pickups that exceeds 10-minutes or more beyond scheduled time
    - Report of methods riders may respond to surveys
    - Customer Satisfaction results (average for period)
    - Customer complaints to include root cause findings and remediation planning as warranted

## Functional Requirements:

The Functional Requirements are listed below. Current requirements are in the “Current” column:

Technology Domain	Current	Requirement	Notes
			Rideon Reimagined ends in January which will include a phased-in plan. Also, received a grant from Council of Governments the purpose of which is to evaluate service and recommend optimizations. The study is 6-month (Four Square and just kicked-off last week). The value \$80,000 approx.
Zones	2 in-service with accommodation for 3	Potentially 15	
Electric Buses	No	Yes	County to supply buses
Operated by	Transit	Transit	
Who supplies the Technology (Backend)	Contractor (Via)	Vendor	
Who supplies the Technology (Endpoints)	Transit	Vendor	i.e., Tablets
Scheduling/ Customer Interface/Requests	Contractor (Via)	Vendor	
Customer Sat / Survey	Contractor (Via)	Vendor	Transit will determine the questions, frequency, and output
Reporting	Contractor (Via)	Vendor	Ridership, Customer Sat, NTD, et al
Vehicle Size	Currently 11-seater	Not determined	
Geography	In-County	In-County	
Transcend zones?	No	Ability to have a Hybrid Flex	View on Map to fully understand what this look like
Hours of Operation	M-F 6a-7:30p	Anticipate 7-days, 16-18 hours perday	By zone, not entire operation
Mobile App	Contractor (Via) supplies	Vendor	Vendor will grant access to County for announcements

### D. Assumption of Operations

The Contractor will be required to assume operations on the 61<sup>st</sup> day following Notice to Proceed (NTP). The Contractor must produce an initial Assumption of Operations plan by NTP +15. A final plan will be due by NTP +30. The plan should contain:

- i. Staffing Plan
- ii. Schedule (by shift)
- iii. List of Work Instructions/Processes developed or under development
- iv. List of proposed changes/service enhancements with schedule to implement
- v. Staff & County training schedule

### E. Assumptions and Constraints

The contractor must possess the resources necessary to fulfill the deliverables of this document.

### F. Contractor will produce contract transition out planning. This will be due NTP+60

Contractor should price with the following options (at a minimum):

- a. The County owning the vehicles and supplying the operators;
- b. The Contractor supplying the technology and support (to include operator-issued endpoints; e.g., tablets)

### 5.6. County's Responsibilities

The County will provide the following equipment and services for the Ride On Flex service:

#### A. Bus

- a. ADA compliant bus with wheelchair access and two (2) wheelchairs;
- b. Bus operator to provide the service;
- c. Radio for voice communications between bus and central dispatch;
- d. Fare collection equipment (able to accept cash, tokens, WMATA SmartTrip smartcard and ability to enter data concerning flash passes).

- B. Central Dispatch
  - a. Central dispatch facility
  - b. Dispatch staff to communicate with bus operators and public
  - c. Work console that will host Contractors Dispatch software
- C. Administrative & IT Staff
  - a. IT Administrative Staff
  - b. Web domain for the Flex service & Customer Support

#### 5.7. Deliverables & Milestones

TMMS Deliverables	Due	Recurring
Assumption of Operations Plan (Initial)	NTP +15	
Assumption of Operations Plan (Final)	NTP +30	
Demonstration of Technology (Initial)	NTP +30	
Demonstration of Technology (Final)	NTP +45	
Continuity of Operations Plans	NTP + 60	
Transition out planning	NTP + 60	
Monthly Report	10 <sup>th</sup> Business Day of 2 <sup>nd</sup> operational month for previous Month	10 <sup>th</sup> Business Day of month

#### 6. SECTION C - PERFORMANCE PERIOD

##### 6.1. TERM

The effective date of this Contract begins upon signature by the Director, Office of Procurement. The period in which the County must order all work under the Contract begins on the contract's effective date and ends after a one (1) year period. The Contractor must also perform all work in accordance with time periods stated in the Scope of Services and individual Task Orders. Before this term for performance ends, the Director at his/her sole option may (but is not required to) renew the term. Contractor's satisfactory performance does not guarantee a renewal of the term. The Director may exercise this option to renew this term two (2) times for one year each.

##### 6.2 PRICE ADJUSTMENTS

- 6.2.1. Prices quoted are firm for a period of (1) year after execution of the contract. Any request for a price adjustment after this one (1) year period is subject to the following:
  - 6.2.1.1. Approval or rejection by the Director, Office of Procurement or designee
  - 6.2.1.2. Submission in writing to the Director, Office of Procurement and accompanied by supporting documentation justifying the Contractor's request. A request for any price adjustment may not be approved unless the contractor submits to the County sufficient justification to support that the Contractor's request is based on its net increase in costs in delivering the goods/services under the contract.
  - 6.2.1.3. Submission within sixty (60) days prior to contract expiration date, if the contract is being amended.
  - 6.2.1.4. The County will not approve a price adjustment request that exceeds the amount of the annual percentage change of the Consumer Price Index (CPI) for the twelve-month period immediately prior to the date of the request. The request must be based upon the CPI for all urban consumers issued for the Washington-Arlington-Alexandria, DC-VA-MD-WV Metropolitan area by the United States Department of Labor, Bureau of Labor Statistics for ALL ITEMS.
  - 6.2.1.5. The County will approve only one price adjustment for each contract term, if a price adjustment is approved.