



## **Northeast Ohio Areawide Coordinating Agency**

### **NOACA**

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### **Request for Proposals (RFP)**

**Assessment of Service Provision for the  
Coordinated Public Transit Human Service Transportation Plan  
for Northeast Ohio**

**Issue Date: November 15, 2023**  
**Deadline to Submit: December 13, 2023, 5:00 p.m.**

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## 1. NORTHEAST OHIO AREAWIDE COORDINATING AGENCY (NOACA)

The Northeast Ohio Areawide Coordinating Agency (NOACA) is a Cleveland-based transportation and environmental planning organization that serves as the metropolitan planning organization (MPO) and designated areawide water quality management agency for the counties of Cuyahoga, Geauga, Lake, Lorain, and Medina in Ohio.

In these capacities it:

- Works with other organizations to help address northeast Ohio's transportation, air quality, and water quality needs
- Conducts metropolitan planning for various modes of transportation, including vehicles, freight, transit, bicycle, pedestrian, etc., while considering the transportation system's impact on the environment and land use
- Prepares the region's long-range transportation plan and short-range transportation improvement program, which is the region's capital budget for federally funded transportation projects
- Conducts studies that address congestion, improve safety and strengthen community livability

The vision of NOACA is as follows: NOACA will **STRENGTHEN** regional cohesion, **PRESERVE** existing infrastructure, and **BUILD** a sustainable multimodal transportation system to **SUPPORT** economic development and **ENHANCE** quality of life in Northeast Ohio.

NOACA is directed by a 48-member Board of Directors, representing the City of Cleveland and all five NOACA counties and their communities, plus transit agencies, the Northeast Ohio Regional Sewer District (NEORS), the Cleveland-Cuyahoga County Port Authority, the Ohio Environmental Protection Agency (Ohio EPA), the Ohio Department of Transportation (ODOT), and the Ohio Turnpike Infrastructure Commission.

The NOACA region is home to 2.1 million people and over 150 units of government. The region is anchored by several urban core cities with the largest being Cleveland.

More information about NOACA is available on our website at [www.noaca.org](http://www.noaca.org).

## 2. INTRODUCTION AND BACKGROUND

The Northeast Ohio Areawide Coordinating Agency (NOACA) is seeking qualified consultants to facilitate the public engagement effort for an update of the [Coordinated Public Transit Human Service Transportation Plan for Northeast Ohio](#) (Coordinated Plan or Plan). The Coordinated Plan focuses on the transportation needs of seniors and individuals with disabilities, establishing goals and strategies to meet their needs and to better coordinate transportation services.

The [federal circular](#) for the Enhanced Mobility of Seniors and Individuals with Disabilities (Section 5310) Program outlines the importance of coordinated public transit-human services planning. These requirements were first implemented under the Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU) federal transit law and amended by MAP-21 and FAST Act legislation. All projects funded through Section 5310 must be “included in a locally developed coordinated public transit-human services transportation plan.” Additionally, the law dictates that the plan must be “developed and approved through a process that includes participation by seniors; individuals with disabilities; and representatives of public, private, and nonprofit transportation.”

## 3. SCOPE OF WORK

The consultant will manage the public engagement efforts of the Coordinated Plan planning process in coordination with NOACA staff, building off of and updating the [2019-2023 Plan](#). The primary scope of work for the Coordinated Plan effort includes:

- public and stakeholder outreach through meetings, interviews, and surveying
- transportation service provider data collection

### A. Definition and Requirements of the Coordinated Plan

The Coordinated Public Transit-Human Service Transportation Plan for Northeast Ohio is the federally mandated coordinated transportation plan for Cuyahoga, Geauga, Lake, Lorain, and Medina counties. NOACA is working to complete the required four-year update to and build upon the 2019 Plan. The Coordinated Plan focuses on the transportation needs of seniors and individuals with disabilities and barriers surrounding their personal mobility.

The federal circular for the Section 5310 program allows for flexibility in the planning process for the coordinated plan but requires, at minimum, the following elements:

1. An assessment of available services that identifies current transportation providers (public, private, non-profit)
2. An assessment of transportation needs for individuals with disabilities and seniors (This assessment can be based on the experiences and perceptions of the planning partners, on more sophisticated data collection efforts, and gaps in service)
3. Proposed strategies, activities, and/or projects to address the identified gaps between current services and needs, as well as opportunities to achieve efficiencies in service delivery.
4. Priorities for implementation based on resources, timeframe, and feasibility for implementing specific strategies and/or activities identified.

Per the Section 5310 circular (FTA C 9070.1G), the timeframe for the coordinated plan should follow the update cycles for metropolitan transportation plans (i.e. four years in air quality non-attainment and maintenance areas and five years in air quality attainment areas). The NOACA region is currently designated as an air quality non-attainment area. Therefore, its Coordinated Plan should be developed for a four-year timeframe.

## **B. Scope of Work**

The following outline of public engagement chapters contained within the 2019-2023 Coordinated Plan provides a roadmap for the scope of work requested under this solicitation.

1. Available Transportation Services
  - a. Update of transportation mode information for the NOACA region. Must include: public transit agencies, air, bus, rail, taxicab, shuttle, limousine, charter bus, transportation network companies (Uber, Lyft) and micro-mobility services.
  - b. In consultation with NOACA staff, create a survey that fulfills the following objectives:
    - i. Identifies specialized transportation providers in the NOACA five-county region
    - ii. Gathers service data, both for the Plan and to update the specialized transportation provider database, [Gohio Mobility](#), with most current information:
      1. Service data must include: agency/company/provider name, contact information, clients served, type of services available, service area, service schedule, other pertinent information;
    - iii. Is available in an online format to facilitate ease of data management
2. Assessment of Transportation Needs (Public Involvement) - In order to accurately and equitably measure Northeast Ohio's needs, consultant should engage specialized populations and their advocates and families, along with specialized transportation service providers. This engagement should include:
  - a. Client/Rider Surveys and/or public meetings: Consultant should propose the best methods for gathering information from specialized transportation clients and riders. For example, public meetings can be difficult for some individuals to attend. Consider conducting outreach events at senior centers or sheltered work locations. Encourage and support feedback through family members, social workers, care attendants, etc.
  - b. Transportation Review Committee meetings: Chosen consultant shall convene and engage with a "Transportation Review Committee." This group should function as a feedback and review team. NOACA will provide contacts to build this group, which should be made up of representatives from specialized transportation providers, senior centers, Area Agencies on Aging, agencies serving individuals with disabilities, social service agencies, transit agencies, medical providers, etc.
  - c. Transportation Provider Survey: As part of the service identification survey described in Section 1.b above, Consultant shall gather information on operational trends from specialized transportation providers in the region. Information gathered on operations should cover the following topics, at a

minimum: providers' experiences with their clients; ability to meet demand for service; trip costs (for provider and those passed onto rider; trip cost calculations- flat fee, per mile, etc); most requested trip purpose; and strengths/weaknesses/ opportunities/threats in the specific service sector.

### **C. Final Deliverable**

The final deliverable should be a service assessment report to be utilized by NOACA staff to inform the creation of goals and strategies within the future Coordinated Plan update. The report should be presented in digital format (PDF, with data captured in excel files) and include the following components:

1. All public feedback data received (raw data and synthesized summary) whether through survey, interview, or comment in public meetings
2. Public meeting agendas and attendee lists
3. Specialized transportation provider data collected through survey and outreach efforts
4. Appendix with exhibits displaying outreach materials, including but not limited to survey tools, fliers, social media posts, and presentations

## **4. QUALIFICATIONS**

The selected vendor (or any of the selected vendor's subcontractors) cannot currently, or at the time of contracting, be listed on any federal, state, or local government jurisdiction debarment or suspension lists.

NOACA is seeking vendors with extensive background in public outreach planning and execution, particularly with diverse populations. Vendors or their team should also be experienced in survey design and implementation. Experience working with seniors and individuals with disabilities is preferred.

## 5. PROCUREMENT TIMELINE

NOACA's process and *estimated* timeline for the selection of a consultant are as follows:

### **December 13, 2023, 5:00p.m. - Deadline for RFP Submittals**

Submittals must be received by NOACA by the above deadline. Proposals shall be submitted in PDF via email to [procurement@mpo.noaca.org](mailto:procurement@mpo.noaca.org). NOACA assumes no responsibility for formatting or transmission errors. Submittals received after the deadline will not be considered. Please reference "Coordinated Plan" in the email subject line.

### **December 2023/January 2024 - Consideration of Proposals**

An evaluation team will select candidate vendor(s) from proposals received. This process will include review and scoring of proposals, and review of references and other information as necessary. Candidate vendors may be interviewed by the team and asked to enter negotiations as part of the selection process. At the end of this process, NOACA will select the proposal it considers the most highly qualified, price and all other factors considered.

### **January 2024 – Execution of Contract**

## 6. REQUIREMENTS FOR PROPOSALS

### **A. General Instructions**

NOACA will not reimburse proposers for any costs incurred prior to award and execution of a contract, including, but not limited, to the preparation and submittal of proposals or participation in the evaluation and negotiation process.

Proposals shall clearly address the evaluation criteria and information requested herein. Overly elaborate proposals and proposals containing only generalized marketing information are discouraged and may result in a lower evaluation score.

Firms included on the current Excluded Parties List System maintained by the United States General Services Administration, or on comparable lists of suspended or debarred firms maintained by the State of Ohio or jurisdictions within NOACA's service area, are not eligible for selection.

### **B. Requirements for Technical Proposal (Volume I)**

The Technical Proposal shall include the following components:

1. A cover letter that identifies the prime consultant and all subcontractors, if applicable. The cover letter shall identify the officer or other responsible executive of the firm authorized to negotiate and agree to a contract by name, title, address, telephone, and email address. This individual shall serve as NOACA's point of contact for all communications regarding this solicitation. The letter should also contain a commitment that the proposed pricing will be valid for not less than 120 days.
2. General information about the firm including location of office(s), number of years in business and areas of service expertise. Identify key management staff and a brief description of their qualifications and experience.

3. Description of the proposer's approach to the project, including a detailed scope of services that reflects understanding of the objectives of the Coordinated Public Transit Plan project. If appropriate, the proposer shall expand on the scope of work and provide suggestions that will enhance the outcomes of the project. This section should detail the tasks needed to accomplish all objectives of the project. The project approach should highlight innovation and creativity, as appropriate. Provide a table, attached to the submission as Appendix A, that summarizes and breaks down the project's deliverables, percentage of work, and estimated time to complete. A table template is attached is attached to this RFP as *Exhibit A*.
4. Key staff to be assigned to this project and the deliverables for which each individual will be responsible. Attach resumes that describe the education, experience and professional certifications for each key staff person. Highlight experience and education relevant to the project. NOACA reserves the right to approve or reject any staff members assigned by primary vendor to this project.
5. Description of the capacity of consultant to perform the work in a timely manner, relative to the firm's present workload and the availability of the assigned staff.
6. Listing of prior work on other projects that are similar in scope to the services requested under this Coordinated Public Transit Plan project. Examples should describe the scope of work and demonstrate successful performance in project completion. The list of prior projects should include assignments undertaken in the past five (5) years, and also identify the duration of the project and the client. Provide contact information (name, title, organization, email, and telephone) for each client on prior work examples. NOACA may contact references as well as other resources to verify a firm's qualifications, experience, professionalism, and ability to perform the work. If any such projects were not satisfactorily completed, provide an explanation of the circumstances.
7. There is no Disadvantaged Business Enterprise (DBE) Goal for this contract, but DBE certified firms are encouraged to apply, and responding vendors are encouraged to subcontract a portion of work to certified DBE firms.
8. List of all subcontractors, identifying those certified as Disadvantaged Business Enterprises (DBE) by the State of Ohio, and the type and percentage of work to be performed by each subcontractor. Include description(s) of subcontractor(s) qualifications, identify key personnel, and provide contact person with respective email and telephone number for any subcontractor(s). NOACA reserves the right to approve or reject any subcontractors proposed by vendor for this project.

### **C. Requirements for Business Proposal - Volume II**

The Business Proposal shall include the following components:

1. A copy of the cover letter included in Volume I
2. A pricing proposal, utilizing the form attached as Exhibit B to this RFP for illustration purposes. An editable version of this form is available [at this link](#). In the pricing proposal, staff hourly rates should be broken down according to base hourly rate, overhead (%), and burdened hourly rate. Direct costs such as travel expenses and

fixed-price payments to subcontractors or vendors will be reimbursed at cost. NOACA will reimburse approved travel and living expenses only for travel more than 50 miles from the traveler's ordinary work location, at the rates specified in the General Services Administration's most current per diem rates for the locality involved.

3. Copies of the proposer's worker's compensation, general liability, professional liability and automobile insurance certificates.
4. If the consultant or subcontractor is DBE certified, a copy or copies of the consultant or sub-consultant's certificate(s), as applicable.
5. Completed form "Certification Regarding Debarment, Suspension & Other Responsibility Matters," attached to this RFP.

The proposer may identify any proposed exceptions to NOACA's Terms and Conditions as contained in this RFP or propose any additional terms it considers appropriate. Such proposed exceptions or additional terms must be specific and include a clear explanation of the reasons for the exception or addition. Please note that certain terms contained herein are required by law or regulation and cannot be modified.

## 7. EVALUATION CRITERIA AND PROCEDURES

### A. Evaluation Criteria

#### 1. Experience/Qualifications (up to 30 points)

Each consultant will be evaluated in regard to their experience and qualifications appropriate to the proposed project. Qualification factors to be considered for this project include:

- i. Public engagement planning and execution
- ii. Survey design, implementation and analysis
- iii. Work with diverse populations, including consideration of unique needs and communication styles
- iv. Work with seniors and/or individuals with disabilities
- v. Planning with a focus on equity and inclusion

#### 2. Project Approach (up to 40 points)

Each consultant will be evaluated based on the approach presented in the Technical Proposal to complete the project. Factors to consider include:

- i. Demonstrated understanding the goals and objectives of the proposed project
- ii. Inclusion of a projected table of deliverables in the Technical Proposal which identifies project components that will achieve the objectives of the project
- iii. Methods and strategies to best accomplish all deliverables of the project
- iv. Creativity and innovation

#### 3. Project Management (up to 30 points)

Each consultant will be evaluated based on the presentation of a management plan that ensures services are successfully completed. Factors to consider include:

- i. Demonstration of effective past project management, resulting in the delivery of a high-quality work product
- ii. Capacity to manage the project deliverables according to defined timeline
- iii. Description of performance evaluation methodology that monitors for achievement of project goals and objectives throughout the duration of the project
- iv. Description of status reporting methodology, including details of both written and oral reporting
- v. Project approach that demonstrates how tasks or parts are coordinated, staffed, and completed
- vi. Identification of potential risks, and steps that can be taken to prevent or mitigate those risks

#### **4. Project Budget and Cost (not scored)**

Points are not awarded for this category, but NOACA will consider cost reasonableness during the evaluation process.

### **B. Evaluation Procedures**

NOACA intends to award a contract to the vendor whose proposal, including negotiated modifications, is considered to provide the best combination of technical quality and cost. A team comprised of NOACA staff will evaluate any proposals received by the deadline. The evaluation team will first evaluate the proposals according to the technical criteria stated above. NOACA may ask vendors for clarification of their proposals; conduct interviews; or request that proposers give presentations. Such interviews may be conducted in person, by telephone or through video conference. If such interviews are held, the evaluation team will re-evaluate the proposals, at which time they may eliminate some vendors from further consideration.

NOACA will then evaluate the remaining firms' pricing proposals. Additional firms may be eliminated at this point if pricing is considered inconsistent with their technical proposals. An excessively low price may be considered as unreasonable as an excessively high price.

NOACA may also negotiate with proposers that remain in the competitive range. Following such negotiations, NOACA may request that the remaining firms submit a Best and Final Offer, which the team will evaluate. The team may then recommend that firm for award. Award recommendation is subject to final approval by the NOACA Executive Director & CEO.

NOACA reserves the right to accept proposals other than the lowest cost offered, reject any and all proposals, or to negotiate separately with any proposer or proposers as deemed to be in NOACA's best interest. NOACA also reserves the right to waive minor informalities, irregularities or errors which do not affect the substance of the proposal, or may award on the basis of initial proposals received without discussions or negotiations with proposers. The original proposal, therefore, should represent the vendor's best effort to meet NOACA's needs at a reasonable price.

## 8. ADMINISTRATIVE PROCEDURES AND CONDITIONS

- A. It is the policy of NOACA that Disadvantaged Business Enterprises (DBEs) shall have equal opportunity to compete for this federally assisted contract, or equal opportunity to subcontract with a prime contractor to perform the requested services.

This proposal does not include a specific DBE goal. However, consultants that are DBE-certified, others that subcontract with a DBE-certified business, or others that demonstrate a good faith effort to subcontract such firms, are encouraged. This documentation must be included with the proposer's submittal. Actions which may be considered as good faith efforts are described in [Subpart C of 40 CFR Part 33](#). If a DBE-certified firm is the prime or sub-consultant, the price proposal should demonstrate the level of DBE participation as a percentage of the total contract.

- B. Consultants agree not to discriminate against any employee or applicant for employment because of race, color, religion, age, creed, sex, sexual orientation or national origin. Such action shall include, but not be limited to, the following: employment, upgrading, demotion or transfer, recruitment or recruitment advertising, layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. Consultants further agree to comply with all requirements of Title VI of the Civil Rights Act of 1964, 42 U.S.C. § 2000d et seq., 49 C.F.R. Part 21.
- C. The proposal, including price, shall be valid for at least 120 days from the date of submission.
- D. An RFP does not constitute an offer or a contract. No contract may be awarded without a resolution by the NOACA Board of Directors.
- E. NOACA reserves the right to amend, cancel or reissue the RFP or to revise the timeline at any time.

NOACA reserves the right to reject any and all proposals and to waive minor irregularities in the proposal process. NOACA may accept any proposal if such action is believed to be in the best interest of the agency.

- F. NOACA is not liable for any cost incurred by the proposer prior to execution of a contract.
- G. The contract between the successful proposer and NOACA shall include all documents mutually entered into including the contract instrument, relevant portions of the RFP and the response to the RFP. The contract must include and be consistent with the provisions stated in the RFP, as may be modified by negotiations.
- H. The prime consultant or system provider will assume the responsibility for all services offered in the proposal regardless of whether directly performed by the prime consultant.

Further, the prime consultant will be the sole point of contact for NOACA with regard to contractual matters.

- I. The consultant project team shall be approved by NOACA. NOACA must approve any changes in the project team.
- J. Any award of contract will be to the consultant that provides the highest value relative to costs.

## 9. QUESTIONS

For questions regarding the RFP, please contact [procurement@mpo.noaca.org](mailto:procurement@mpo.noaca.org). Submitting questions as early in the process as possible provides NOACA the opportunity to respond; questions received near the deadline may not be addressed. All answers will be publicly posted on [NOACA's website under About-Contact Us-Doing Business with NOACA](#).

## EXHIBIT A - Example Table of Deliverables

Deliverable	Description	% Work	Time to complete (months)
<b>Total</b>		<b>100%</b>	

## EXHIBIT B – PRICING PROPOSAL

STAFFING COSTS					
Proposed Team Member Name or Position Classification	Base Hourly Rate*	Overhead Rate (%)	Burdened Hourly Rate (BxC)	Estimated Hours	Total Estimated Cost (DxE)
			\$0.00		\$0.00
			\$0.00		\$0.00
			\$0.00		\$0.00
			\$0.00		\$0.00
			\$0.00		\$0.00
			\$0.00		\$0.00
			\$0.00		\$0.00
<b>TOTAL STAFFING COSTS</b>					<b>\$0.00</b>

*\*Base Hourly Rates shall be quoted at cost, without overhead or profit.*

Direct Expenses	
Type	Estimated Cost
<b>Total Direct Expenses</b>	<b>\$0.00</b>

<b>FIRM FIXED FEE (PROFIT):</b>	<b>\$0.00</b>
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<b>TOTAL ESTIMATED PRICE</b>	<b>\$0.00</b>
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<b>Signature:</b>	
<b>Name:</b>	
<b>Title:</b>	
<b>Company Name:</b>	
<b>Date:</b>	

## CERTIFICATION REGARDING DEBARMENT, SUSPENSION & OTHER RESPONSIBILITY MATTERS

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This Certification is required to be submitted to NOACA on behalf of the principal bidder/proposer and all subcontractors whose subcontracts are reasonably anticipated to exceed \$25,000 in value.

- A. The undersigned Bidder/Proposer/Subcontractor ("Attester") certifies to the best of its knowledge and belief that the Attester and/or any of its principals or subcontractors:
1. Are not presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from covered transactions by any Federal department or agency;
  2. Have not, within a three-year period preceding this bid/proposal, been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain or performing a public (Federal, State or Local) transaction or contract or subcontract; violation of Federal or State antitrust statutes, or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements or receiving stolen property; and
  3. Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State or local) with commission of any of the offenses enumerated in Paragraph 2 above; and
  4. Have not, within a three-year period preceding this bid/proposal, had one or more public transactions (Federal, State or local) terminated for cause or default by any federal, state or local agency.

"Principals" for the purposes of this certification, means officers, directors, owners, partners, and persons having primary management or supervisory responsibilities within a business entity (e.g., general manager, plant manager, head of a subsidiary, division, or business segment, and similar positions).

This certification concerns a matter which may be within the jurisdiction of an agency of the United States and the making of a false, fictitious, or fraudulent certification may render the maker subject to prosecution under Section 1001, Title 18, United States Code.

- B. The Attester shall provide immediate written notice to NOACA's Procurement Officer if, at any time the Attester learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.
- C. A certification that any of the items in Paragraph A exists will not necessarily result in withholding of an award under this solicitation. However, the certification will be considered in connection with a determination of the Attester's responsibility. Failure of the Attester to furnish a certification or provide such additional information as requested by NOACA may render the Attester non-responsible, and the Attester shall not be considered for award.
- D. Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render, in good faith, the certification required by Paragraph A. The
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knowledge and information of an Attester is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.

- E. The certification in Paragraph A is a material representation of fact upon which reliance was placed when making award. If it is later determined that the Attester rendered an erroneous certification, in addition to other remedies available to NOACA, NOACA may terminate the contract resulting from this solicitation for default.

If the Attester is unable to attest to any of the statements in this certification, it shall attach an explanation.

THE UNDERSIGNED CERTIFIES OR AFFIRMS THE TRUTHFULNESS AND ACCURACY OF THE CONTENTS OF THE STATEMENTS SUBMITTED ON OR WITH THIS CERTIFICATION AND UNDERSTANDS THAT THE PROVISIONS OF 31 U.S.C. SECTIONS 3801 ET. SEQ. ARE APPLICABLE THERETO.

Executed this \_\_\_\_ day of \_\_\_\_\_, 20\_\_.

Name of Bidder/Proposer: \_\_\_\_\_

Address: \_\_\_\_\_

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

Signature of Authorized Official: \_\_\_\_\_

Printed Name of Official \_\_\_\_\_ Title of Official \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_ E-Mail \_\_\_\_\_

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