

INCA Community Services, Inc.
dba JAMM Transit



REQUEST FOR PROPOSAL
Paratransit Scheduling and Dispatch
Software

Release Date: May 22, 2020

REQUEST FOR PROPOSAL

Software System

1. **BACKGROUND INFORMATION.**

- 1.1. INCA Community Services, Inc. is a not for profit private corporation. INCA Community service dba JAMM Transit provides public transportation to Johnston, Atoka, Marshall, and Murray Counties. The agency is the grantee for numerous federal and state programs. It operates and lends administrative support to a multi-program operation.
- 1.2. INCA's JAMM Transit program is embarking on a new endeavor to bring technology to our drivers and riders that make riding the system easier and more efficient for all.

2. **PURPOSE:** The purpose of this RFP is to secure the software and technology systems that will aid us in our daily mission of providing quality demand responsive service in an economical manner. The goal of the agency is to establish an effective, easy to use system for the riders to be able to schedule rides with ease and the drivers to have less paperwork to utilize each day.

3. **CONTRACT REQUIREMENTS:** INCA Community Services, Inc. dba JAMM Transit (hereinafter referred to as JAMM) is seeking proposals from qualified companies (hereinafter referred to as CONTRACTOR) to install software features and an app to perform our daily ridership throughout the counties of Johnston, Atoka, Marshall, and Murray in Oklahoma.

4. **DESCRIPTION.** This contract shall be for the purchase of a Paratransit Scheduling and Dispatch Software System designed to function in a paratransit bus and minivan environment in accordance with the instructions, terms and conditions, and requirements/specifications contained in this agreement.

5. **TERM OF CONTRACT.** The term of this contract is between the date of award with all software being installed and completed by June 30, 2021.

6. **QUANTITIES.** Quantities listed below are substantially correct, but the estimate of anticipated needs is subject to change. INCA reserves the right to purchase more or less than the estimated quantities unless otherwise specified by the proposer. The following chart shows the estimated needs of the agency:

Number of Vehicles	Vehicle Description
49	Software License

1	Map data for Service Area within 4 counties
1	Trip Bookings app with credit card capabilities
1	Pre/Post Trip functionality
1	Order Importer Module
	Onsite Training
	Offsite training (webinars, instructional videos)
	Annual Licensing and pricing requirements (yearly cost must be included)

Vehicle descriptions:

Number of Vehicles	Vehicle Description
1	11 Passenger with wheelchair position Dodge Promaster
14	14 Passenger buses with 2 wheelchair seats Ford E450
3	15 Passenger Chevy Express Vans
3	19 Passenger bus with 2 wheelchair seats Ford E450
20	ADA Dodge Minivans
4	Dodge Minivans
1	20 Passenger Chevy Bus
3	9 Passenger bus with 1 wheelchair seat Ford E350

7. **TYPE OF CONTRACT.** Firm, fixed price for the term of the contract.
8. **SUBMISSION REQUIREMENTS.** Contractors are required to submit their proposals via email to e.pogue@incacaa.org by June 23rd, 2020.
 - 8.1. Contractors will be permitted to submit any additional information they consider relevant to the project scope of work and the project at hand. All materials must be labeled and the expressed intent described within the proposal submitted.
 - 8.2. All bids must include all information requested within the RFP and an overall proposal sheet must show the required pricing. Any additional pricing must be submitted as well.

- 8.3. At minimum the proposal must include all details listed within the scope of work and list a detailed individual pricing of all equipment and services
9. **SCOPE OF WORK.** The following are elements the proposal should contain to meet the scope of work:
- 9.1. ***Software System/Technology Description***
- 9.1.1. Proposers should fully describe the software scheduling system being offered as part of this submission, along with any other ITS technologies the vendor may be proposing. Vendors should clearly state the capabilities of each product and its suitability to the task of addressing scheduling software needs.
- 9.2. ***Implementation Plan***
- 9.2.1. Proposers should fully describe the proposed implementation plan, detailing all major milestones in the process. A proposed timeframe from notice-to-proceed through testing, de-bugging, and “live” operation should be developed as an integral part of this proposal. The implementation plan must clearly state the roles and responsibilities and the scheduling an integrated technology solution (scheduling software and MDTs). The software and ancillary equipment furnished hereunder must be tested, debugged, operating “live” and fully functional on or before the end date of the contract agreement. .
- 9.3. ***Quality Assurance Plan***
- 9.3.1. Proposers should describe in detail their management strategies for overall quality assurance in the installation, start-up, and operation of the scheduling and dispatching system software. At a minimum, proposers should address:
- 9.3.1.1. Project Management and Staffing – Describe the proposed individuals and team approach used to successfully communicate with the project personnel at purchaser location. If contractors are used for any part of the installation, customization, or maintenance of the proposed software system, this element of your overall approach must be identified here. The vendor must designate one individual with complete control over all installations.
- 9.3.1.2. Quality Control – Describe steps and techniques employed by the proposer to ensure the integrity of databases (e.g., street networks, client databases, etc.) that may be required to be imported and/or converted for use in the proposed scheduling system.
- 9.3.1.3. Maintenance, Support, and Upgrades – Describe the proposer’s network of technical support during the project, focusing both on the critical initial implementation period as well as long-term operation. Describe procedures for rendering support, including the availability of technicians to provide on-site repairs and ability

to remotely access, diagnose, and make necessary repairs.
Technical support policies and pricing must be explained in detail and the amounts included in the bid proposal.

9.4. Training

- 9.4.1. Proposers should provide a detailed schedule and course outline for the necessary training of the cooperative agency personnel on the proposed scheduling system software. Proposers should assume 10 individuals will participate in training. This section of the proposal should identify the training course content, the number of courses required, and type of training (classroom, hands-on, etc.) that will be provided, the length of the training session, etc. Proposers should indicate when the training should be provided in the context of the overall implementation time schedule provided above in the implementation plan. Qualifications of the staff providing the training should be listed. The cost of training assuming class room training for 10 individuals and a minimum of 10 training sessions per class lasting a total of 20 hours (aggregate for all class room training provided by the bidder) and a minimum of 20 hours of hands on training for individual employees (aggregate hours for said hands on training) must also be included in the bid proposal.

10. SYSTEM REQUIREMENTS.

10.1. Transit Assistant/Myleo-net Capabilities

- 10.1.1. The system must meet the Oklahoma Department of Transportation guidelines on submitting trip information into the Transit Assistant/Myleo-net Databases as required by ODOT.
- 10.1.2. CSV files must be used in the format consisting of ridership data, (details and examples attached under attachments). Multiple riders sharing trip data will be grouped into a single trip.
- 10.1.3. The following fields must be present in the uploaded files:
- 10.1.3.1. Trip Identification:
- 10.1.3.1.1. County: Make sure to include leading zeros. Count '01' is different from county '1'.
- 10.1.3.1.2. Route: Make sure to include leading zeros. Route '01' is different from route '1'.
- 10.1.3.1.3. Date: Format date as MM/DD/YYYY. Example: 05/06/2020
- 10.1.3.1.4. Driver
- 10.1.3.1.5. Vehicle: Specify the vehicle ID of the desired vehicle.
- 10.1.3.1.6. Beginning Odometer: Must be a decimal number. Cannot overlap Ending Odometer.
- 10.1.3.1.7. Ending Odometer: Must be a decimal number. Cannot overlap Beginning Odometer.
- 10.1.3.1.8. Hours of Service: Must be a valid time in format HH:MM.
- 10.1.3.2. On-Demand Route:

- 10.1.3.2.1. Origin
- 10.1.3.2.2. Destination
- 10.1.3.2.3. Passenger Type: Specify a single character. G=General, E=Edlerly, D=Disabled, B=Both Elderly and Disabled
- 10.1.3.2.4. Core Code: Specify a valid core code. If your project uses sub-codes this can be left blank and core code will be automatically determined.
- 10.1.3.2.5. Sub-Code: Specify a valid sub-code.
- 10.1.3.2.6. Fare Optional for pass and money. Decimal values should be available for use.
- 10.1.3.2.7. Sponsored: Enter True if the rider has services through a sponsored trip.
 - 10.1.3.2.7.1. These trips are usually considered contracted trips for this agency.
- 10.1.3.2.8. Pickup Odometer: must be a decimal number. Cannot overlap beginning/ending odometers.
- 10.1.3.2.9. Dropoff Odometer: Must be a decimal number. Cannot overlap beginning/ending odometers.
- 10.1.3.2.10. Call In Time: Optional. Must be a valid time.
- 10.1.3.2.11. Pickup Time: Optional. Must be a valid time.
- 10.1.3.2.12. Dropoff Time: Optional. Must be a valid time.

10.2. ***Client Database***

- 10.2.1. The agency currently has minimal information on riders. A database will need to be created and a template will need to be sent for us to input what data we currently have on our ridership.
- 10.2.2. The selected proposer, as soon as practical after notice to proceed, will evaluate the current client database and develop appropriate data conversion process that converts existing client information into a compatible format for use in the scheduling and dispatching software solution.
- 10.2.3. Client database shall be capable of providing a full range of data elements for each client in the system. Information shall include full identification including gender, address, contact details, third party/emergency contacts, disability status, mobility aids used, required accommodations, caregiver, language spoken by client, program affiliation, and third-party contract payee options. Additionally, the system shall permit assignment of various demographic codes, such as elderly, youth, etc.
 - 10.2.3.1. The system must be capable of tracking trip purpose for each trip with user customization possible in terms of defining various trip purposes.
 - 10.2.3.2. The proposer must allow for specific customization of database by the agency to fully meet the agency needs.

- 10.2.4. The customer database shall provide functionality to allow customer service agents to readily look-up client records for edit, trip-booking, etc. Search capabilities should be based on customer name, and identification number, or a similar characteristic. When looking up a customer, auto-complete features are desirable to minimize user input.
- 10.2.5. System will be capable of registering new clients, capturing information about addresses, disability type, space requirement, load/unload time, fares, payment options, eligibility conditions, funding sources, etc. while a customer service agent has the new customer on the telephone. The system must permit edit of all fields in a customer records on a real-time basis andl permit suspensions (temporary) of service.
- 10.2.6. The system must be capable of recording and displaying trip history details specific to each client, such as recent trip dates, trip origins, or trip destinations. The system must have the ability to capture information on trip cancellations and no-shows specific to individual customers.
- 10.3. ***GIS and Mapping Functions***
 - 10.3.1. Proposer must provide GIS functionality in the software product offered.
 - 10.3.1.1. The software must incorporate GIS capabilities and allow user access to map views of the service area; individual routes or runs, and/or bus stops; specific street address; or other specified user-defined zoom levels. Panning/zooming shall be incorporated into the mapping capabilities.
 - 10.3.1.2. The GIS functionality of the proposed software must support other GIS analyses and be capable of printing/producing camera ready printed output and provide geographically based query functions.
 - 10.3.2. Mapping capabilities and the dispatcher's abilities to identify approximate current locations, based on the last known point in the schedule is essential.
 - 10.3.3. The service area boundary must be readily identifiable and graphic or query functionality must be present to determine if requested trip origins and destinations are within the service area.
 - 10.3.4. System shall be capable of exporting data and graphic images to other software platforms. If the software is limited to basic mapping functions, then data shall be exportable to standard GIS software (e.g., ESRI mapping products) enabling external GIS analyses. System shall be capable of printing maps to system printers or other devices (plotters, etc.).
 - 10.3.5. Access to maps must be a seamless form within the scheduling software, user should be able to generate a map with a single muse click or menu selection.
 - 10.3.6. Base maps must contain current attributes on street segments, addressing, speed limits, etc. Street network shall permit definition of

segment characteristics, such as speed limits, one-way direction, etc. Preferably using a similar technology to google maps.

- 10.3.7. GIS functionality shall include ability to develop overlays or coverages of municipal boundaries and other key geographies.
 - 10.3.8. System shall permit definition and display of physical features that act as barriers to transportation.
 - 10.3.9. System shall be capable of defining and displaying point files, indicating system time points, bus stops, major intersections, major transfer points, and major destinations of travel, or other points of interest.
 - 10.3.10. Service area map shall contain definitions of street segment name and address ranges. System must have full geocoding capabilities allowing the agency to enter an address and locate the address on the map. The system should be capable of handling various abbreviations of names in the geocoding process.
 - 10.3.11. The system must permit manual assignment of x- and y- coordinates in the event an address cannot be geocoded based on existing map address range attributes.
 - 10.3.12. The system must have the capability to use street level GIS map data speed to calculate driving and length duration during the scheduling process. The system must have the capability to use street GIS level map data to identify one-way street information while calculating drive length and duration.
 - 10.3.13. For any trip reservation, the system must be capable of providing, using the GIS capabilities of the software, a map image of the trip origin and/or destination. Trip data must be compatible for viewing and integration on Google Earth applications.
- 10.4. Trip Reservations
- 10.4.1. The system must permit trip booking while transit personnel are on the phone with the client/customer. The system must be capable of processing both subscription (standing-order) and demand response trips in this manner. The system must be capable of processing, scheduling, and dispatching same day trip orders without the need of manual intervention from users.
 - 10.4.2. The system must permit reservation staff to access client records by entering the client last name, telephone number, or other ID number. Typical protocols involve booking trips using the client's last name. Additional details must be available to the customer service agent in order to distinguish between customers with the same last name. The system will have the capability to automatically populate the reservation screen with the customer data, including commonly used locations, mobility devices, eligibility, PCA, etc. after the individual has been identified.
 - 10.4.3. Pop-up windows or list boxes shall be used to display lists of clients for easy access and selection. Once selected, pertinent data from the client

database file shall be accessible to the reservation clerk, either through on-screen display or pop-up windows.

- 10.4.4. The system shall have a default and common pick-up address features available.
- 10.4.5. The system shall default to the client's home address as the pick-up location and provide ability to enter alternative addresses through keystroke entry or through the use of list boxes of alternative pick-up addresses associated with that client (e.g., common travel destinations of that customer).
- 10.4.6. The system shall be capable of displaying, through popup windows, list boxes, or similar alternatives, a list of the most frequent client travel destinations and/or recent destinations of travel for easy insertion into the destination field. Users must be able to select destinations from these fields and populate trip destination fields through this selection process.
- 10.4.7. The system shall be capable of automatically generating trip reversals or booking the return trip from the originating trip destination to trip origin.
- 10.4.8. The system shall be capable of scheduling based on requested pick-up time or customer appointment time and shall take into account appropriate travel time to ensure on-time arrival at a destination.
- 10.4.9. The system shall be capable of incorporating a user-specified policy on pick-up time negotiation with the client. System must be capable of incorporating multiple policies.
- 10.4.10. The system shall be capable of accepting trip reservations for a period of at least up to 365 days in advance of the requested trip date.
- 10.4.11. The system shall be capable of accepting standing orders. The system shall permit day of the week type travel dates and monthly calendar-based travel dates, (e.g., first and third Wednesday of each month).
- 10.4.12. The system shall be capable of setting finite limits on the length of subscription orders. Systems shall permit transit personnel to "turn off," on a temporary basis, a client's standing order. System shall permit entry of both a start date and end date of the time period when the client will not take the standing order trip.
- 10.4.13. System shall provide means for a customer service representative to easily and quickly access existing trip reservations for the client in order to edit travel destination, trip dates, and/or travel times.
- 10.4.14. System shall permit cancellation of any trip in the system in advance consistent with defined system policies on trip cancellations. System shall maintain a cancellation record, by client, to facilitate system management of sanctions for excessive customer abuse.
- 10.4.15. System shall be capable of temporarily suspending a client's eligibility for service. System shall permit entry of both a start date and end date of the time period when the client's ridership privileges are suspended. During

this period, system shall not permit trip booking. System shall have provisions, in the event an individual customer's service is temporarily or permanently suspended, to display a warning alert or physically block a reservation agent from booking a suspended client's trip.

10.4.16. System must be capable, during the course of the reservation entry process, of allowing customer service agents to add personal care attendants and companions to the trip order.

10.4.17. System, at the conclusion of trip booking, shall provide a confirmation of the booking with fare(s), if applicable, to be paid by the user(s), escorts, or companion.

10.4.18. System shall provide methods to enable customer service agents to easily retrieve an existing trip reservation and, upon customer request, cancel the reservation. System shall provide various trip codes to document the reason for the cancellation (e.g., "cancelled on customer request" etc.).

10.5. **Scheduling**

10.5.1. System shall have capability to perform fully automated scheduling, either in batch mode or in the scheduling of individual trips.

10.5.2. The system shall provide dispatchers with web-based tools to proactively manage OTP, no-shows, cancellations, subscriptions and late trips.

10.5.3. The system shall automatically send updates of the dispatched trips to the MDT's. The web-based tools provided will allow managers/supervisors to monitor their driver's performance on real-time.

10.5.4. The system shall optimize same day trip orders with advance trip orders and automatically send updates to the MDTs.

10.5.5. The scheduling process shall be completely automated and have a proven capability to function without a scheduling position initiating the scheduling. The automated scheduling process shall continuously look to improve schedules based on real time operating factors such as cancellations, no-shows, vehicles positions, driver performance, etc.

10.5.6. System shall be capable of scheduling, in batch mode on a next-day basis, all reservations for a designated travel day. Scheduling shall be based on the actual street network in the service area (e.g., actual x- and y- coordinates, not zones), parameters associated with network segments as established in the GIS system, physical barriers, speed parameters, time of day, and appropriate dwell times for the boarding and alighting of passengers.

10.5.7. System shall permit the establishment of base runs or subscription templates based on existing standing orders. System shall be capable of evaluating base runs in order to optimize run in terms of least distance and travel time, based on network factors.

10.5.8. System shall permit trips to be placed in the system schedule but remain unassigned to a specific run. This can be accomplished through a user

manual setting of the trip to “unassigned” or “will-call” category or similar means.

- 10.5.9. System shall be capable of permitting manual insertion of such trips into the schedule, with automatic dynamic updating of the remaining scheduled pick-ups and drop-offs on the run.
- 10.5.10. System shall be capable of taking trip orders on a same day basis and dynamically scheduling the trip into existing schedules. System shall consider existing path of route travel, existing customer assigned trips, and system policies on travel and pick up time windows in making the scheduling assignment. If system is capable of producing multiple solutions to the trip assignment, priorities, expressed on some type of score or other method, it shall show the best possible choice of assignment as the default selection.
- 10.5.11. When a same day order is accepted and assigned to a run (or unassigned run is assigned to a run), it is imperative that the system shall be capable of dynamically updating the remaining scheduled pick-ups and drop-offs on the run’s schedule.

10.6. **Schedule**

- 10.6.1. System shall be capable of producing schedules, by run, in chronological order or by sequential run number, indicating projected arrival time of system vehicles at each origin and destination.
- 10.6.2. Schedules must be developed on zones or counties, based on user specified service zones. System must be capable of recognizing geographic zones and assign trips to the proper zone when systems serve multiple counties with dedicated vehicles and staff.
- 10.6.3. Once generated, the system shall be able to display all schedules for all runs on a given day. Display shall contain all pertinent run data and contain necessary menu and edit tools to provide manual adjustments, as necessary, to the scheduled runs.
- 10.6.4. System shall have internal validation controls to ensure that schedules do not violate schedule and work rules. Additionally, the system shall have capacity to evaluate overall travel time for individual passengers to ensure that system travel time limitations are not exceeded.
- 10.6.5. System shall be capable of generating or identifying trips that violate system parameters so that staff can attempt to remedy the violation.
- 10.6.6. System shall provide the capability of scheduling staff to manually move trips after schedule development. When such overrides are made, the system shall record and time-stamp the override action in the trip record (or in an associated database) in order to provide a historical account of changes to the original (booked) reservation.
- 10.6.7. System shall be capable of scheduling trips to established runs taking into account system labor rules on work hours, breaks, and employee work hours.

- 10.6.8. In assigning passengers to vehicles and/or vehicles to system runs, the system shall be capable of recognizing the need for accessible vehicles, vehicle capacity, etc., in making said assignments. System shall have the capability of assigning vehicles to zones or counties.
- 10.6.9. System shall be capable of adding trips to previously generated schedules or re-assigning trips from one run to another in dynamic fashion.
- 10.6.10. System shall be capable of evaluating individual trip parameters and select runs that best satisfy the requirements of the reservation while maintaining the integrity of existing reservations on the same run. If the system generates a range of alternatives, the system shall present alternatives in rank order with the highest ranked alternative indicating the “best” selection. The best selection will be chosen based on vehicle GPS of current vehicles on the road (in the case of same day trips) and the information of other trips currently within the schedule for the time that the trip in question is being booked.
- 10.6.11. Anytime a schedule is edited, the system must be capable of updating the schedules of all other impacted trips so all previously scheduled trips must remain on time, not violate travel time rules, etc. The scheduling process must be completely automated and have the capability to function without a scheduling position initiating the scheduled. The automated scheduling process must continuously be looking to improve schedules based on real time operating factors such as cancellations, no-shows, vehicles positions or driver performance. The system must optimize same day trip orders with advance trip orders and automatically send updates to the MDTs.
- 10.6.12. If the system cannot schedule all orders for the day of travel being scheduled, then the system shall be capable of displaying all such trips in its own dataset so that staff may consider manual overrides to the schedule and/or assignment of the trip.
- 10.6.13. Once trips are assigned to a scheduled run, the system shall be capable of graphically displaying, on the GIS system, the sequence of pick-ups, drop-offs, and route path for the run.
- 10.7. **Dispatching**
 - 10.7.1. Systems shall allow dispatchers access to run itineraries based on run number, vehicle number, or client name. System shall be capable of displaying the run number, number of passengers on the run, scheduled arrival time, estimated time of arrival and any special circumstances. Information displays must associate with the time of day (e.g., 10:00 a.m. events are displayed at the top of the list window when the dispatcher makes queries at 10:00 a.m.).

- 10.7.2. System shall be capable of assigning drivers to runs. System shall take into account driver work schedules, qualifications, and other factors to ensure compliance with system policies.
- 10.7.3. System shall be capable of assigning vehicles to scheduled runs taking into account mobility needs of customers assigned to the run, thereby ensuring sufficient wheelchair capacity at all times.
- 10.7.4. Dynamic updating of assigned vehicles must be possible in order to take into account vehicles pulled from service due to mechanical failure, lift failure, or other failure event found during the driver's pre-trip inspection.
- 10.7.5. System shall be capable of automatically displaying to the dispatcher/scheduler cancellations, same day reservations, and will-call return trips waiting for vehicle assignment (e.g., trips/reservations made but not yet assigned/scheduled).
- 10.7.6. If the dispatcher is advised that a vehicle is not fit for service, the system shall be capable of programming a vehicle substitution on the affected run(s).
- 10.7.7.
- 10.8. **Web Interface**
 - 10.8.1. Solution must be web-based and fully functional via Internet Explorer 9x or higher. If another browser is essential to system operation, offeror must indicate required browser to be used.
- 10.9. **System Parameters**
 - 10.9.1. System shall have capability for user specified settings that govern the scheduling process (e.g., average speed; dwell times; load times; etc.).
 - 10.9.2. Vendors should specify the range of parameters that can be user set and how the vendor will assist the transit system in the initial setting of these parameters to ensure maximum scheduling efficiency in daily operations.
- 10.10. **Reporting**
 - 10.10.1. Software shall be capable of generating a range of management and service reports necessary to permit sufficient oversight of the transit service. Software will also provide reports that meet NTD and state requirements. The software system shall support real time web based operational supervision and on time performance reporting. All reports are to be completely web based, can be run on demand and exportable into csv, pdf, word, etc.
 - 10.10.2. System shall also have the ability to run a certain report or reports on a set schedule and delivered to an email address in a particular format, i.e. monthly reports on revenue and deadhead hours and miles sent to an email address of the user's in an excel file.
 - 10.10.3. System shall be capable of permitting the user to create, format, and print user- defined reports based on any data element contained in the database.
- 10.11. **Communications**

- 10.11.1. It shall be the submitting bidder's responsibility to determine the available and most appropriate communication protocols for use in mobile data communication. These methods may include but may not necessarily be limited to both conventional radio (e.g., 450 MHz) and/or wireless communication networks maintained by existing cellular carriers (802.11b/g 2.4Ghz unrestricted).

10.12. Log-On Functionality

- 10.12.1. All driver screens shall always display the following information:
 - 10.12.1.1. Current system time, the time should be able to be depicted by a twenty-four (24) hour clock, or alternatively an AM/PM designation.
 - 10.12.1.2. Communication network status.
 - 10.12.1.3. New message indicator.
 - 10.12.1.4. Basic controls.
- 10.12.2. Software will also provide users with the ability to:
 - 10.12.2.1. Switch between a "day" mode graphics display and a "night" mode graphics display that have been optimized for the ambient lighting expected under those conditions;
 - 10.12.2.2. Adjust volume.
 - 10.12.2.3. Adjust backlighting of display.

10.13. Communication Functionality

- 10.13.1. The MDT shall have, at a minimum, the following communication functionalities:
 - 10.13.1.1. *Visual/Audio Alerts*
 - 10.13.1.1.1. MDT shall be capable of providing visual and audible alerts to indicate incoming messages.
 - 10.13.1.1.2. The MDT unit shall be capable of sending a message and notifying the driver of the success or failure of the transaction.
 - 10.13.1.2. *Operator Response*
 - 10.13.1.2.1. The driver must be able to acknowledge incoming messages (as deemed necessary). After the driver acknowledges an incoming message, it shall be displayed on the MDT unit.
 - 10.13.1.2.2. The MDT unit shall also be capable of allowing the driver to respond to a message. This acknowledgement shall be through use of the units' function keys. The MDT unit shall be capable of sending a message and notifying the driver of the success or failure of the transaction. The option will be given to the driver to resend the message should the message not be delivered successfully. This sending method is known as "Send and Notify."

- 10.13.1.2.3. The MDT unit shall restrict access to all functions while the vehicle is in motion. GPS telemetry, current system time, communication network status, and new message indicator may be displayed during vehicle motion.

10.13.1.3. *Messages and Message*

- 10.13.1.3.1. The MDT unit must be capable of receiving predefined messages when a specific numeric code is sent from the host application.
- 10.13.1.3.2. The MDT unit shall be capable of queuing messages in a buffer and repeatedly attempting to deliver them to the host application. Each message shall be configured to attempt delivery indefinitely or to attempt delivery only for a fixed period of time after which the message will be discarded. This sending method is known as “Store and Forward.”
- 10.13.1.3.3. The MDT unit shall also be capable of sending messages that are sent only once, regardless of whether they are acknowledged. This sending method is known as “Send and Forget,”
- 10.13.1.3.4. The MDT unit shall be capable of receiving predefined messages when a specific numeric code is sent from the host application.
- 10.13.1.3.5. The MDT unit shall be capable of sending a series of “canned” messages that can be user defined by the customer in conjunction with the vendor.
- 10.13.1.3.6. The MDT unit will be capable of requesting the manifest from the server.

10.14. *Automatic Vehicle Location*

10.14.1. *Communication Protocols*

- 10.14.1.1. The MDT unit will have an option that will allow Automatic Vehicle Location information to be passed to the server and stored in the database based on automatic refresh rates every 60 seconds or more frequently depending upon the transmission capacity of the communications infrastructure.

10.14.2. *Navigation Functionality*

- 10.14.2.1. The MDT must be capable of displaying in-vehicle maps and providing turn list directions.
- 10.14.2.2. The MDT must be capable of providing navigation directions including voice annunciation and visual display of trip route and turn directions. This process shall be hands-free, and drivers should not have to enter destination address to use the map navigation, as the software will do this automatically.

- 10.14.2.3. Drivers will not have to start the map navigation as a separate software application. The navigation functionality will be integrated into the in-vehicle software application.

10.14.3. Display Functionality

- 10.14.3.1. The MDT unit shall allow the driver to scroll through the manifest up to the maximum number of transmitted trips as determined by the paratransit operator.
- 10.14.3.2. The MDT unit shall be capable of adding, updating, and saving new trip data without driver action.
- 10.14.3.3. The MDT unit shall provide drivers with a manifest, passenger/trip information and other screen displays that permit performance of other actions.
- 10.14.3.4. The MDT unit shall alert driver to changes in manifest via color-coded messages and with an audible tone.

10.14.4. Manifest Screens

- 10.14.4.1. The MDT unit Manifest Screen must provide drivers with an overview of their manifest sufficiently detailed to understand trip origins, destinations, and sequence.
- 10.14.4.2. Additional trip message lines must be available by scrolling.
- 10.14.4.3. All trips must be shown on the display in ascending order of estimated stop times. The current trip must be located at the top of the manifest screen.
- 10.14.4.4. When the driver completes the current trip, the MDT unit shall automatically delete it from the manifest screen. The screen must display multiple rider pick- ups and drop-offs from the same address.
- 10.14.4.5. At any time after the driver has logged on to the system and received a manifest, the MDT unit shall have capability to dynamically update the manifest by inserting additional trips sent to it by the dispatch system. Trip insertions must also follow the protocol of displaying trips in ascending order of estimated stop time.
- 10.14.4.6. At any time after the driver has logged on to the system and received a manifest, the MDT unit shall update the manifest and delete all cancelled trips.
- 10.14.4.7. The driver must be able to access the additional screens that provide additional functionality via single keystrokes, use of function keys, or similar one-stroke methods. Access to additional screens must be restricted while the vehicle is in motion.
- 10.14.4.8. The driver must also be able to access the passenger/trip information screen from the Manifest Screen by a single keystroke, using a keypad key.

10.14.5. Passenger/Trip Information Screen

- 10.14.5.1. The MDT shall have a passenger/trip information screen that provides the driver with detailed information about each stop (pick-up or drop-off).
- 10.14.5.2. If the level of detail in this screen exceeds the visible viewing area of the display screen, additional lines of trip information shall be viewable through use of a scrolling function.
- 10.14.5.3. The driver shall be able to edit trip information by pressing the arrow keys. Vendor should indicate which data elements are editable by the driver; information, at a minimum, should include passenger type, fare, and number of passengers at stop.
- 10.14.5.4. The driver must be able to access the manifest screen from any display screen on the unit via a single touch or keystroke.
- 10.14.5.5. The driver must be able to access additional screens from the detailed passenger trip information screen by a single touch or keystroke.
- 10.14.5.6. If the rider and trip numbers, number of riders, attendants and companions, and fare amounts and types were in the original trip message that was transmitted to the MDT unit, the MDT shall have preformatted screens where this data is automatically populated in the appropriate fields.

10.14.6. Other Action Screens

- 10.14.6.1. The MDT unit shall provide additional functionality to permit voiceless communication between vehicle and dispatch.
- 10.14.6.2. Such screens shall display a list of information requests to be completed by the driver and transmitted to system dispatch that are necessary to complete data required for each trip. The MDT unit shall be capable of automatically providing some data, such as odometer reading, and shall be capable of time-stamping all critical events.
- 10.14.6.3. After the driver has used the MDT unit to record a rider's boarding, the unit shall issue prompts regarding any other data that needs to be completed by the driver before the driver can return to any other screen.

10.14.7. Data Messaging

- 10.14.7.1. The following types of message traffic shall be supported by the MDT unit and related software, enabling voiceless communication between driver and dispatch. To the extent feasible, information flow/transmission shall be packaged as pre-defined, enabled by the driver by simple keystrokes or touch screen action. Pre-defined messaging shall be customizable and shall be established, based on consultation between the purchaser and the vendor, prior to installation. Messages shall include, but not necessarily be limited to:

- 10.14.7.1.1. Driver log-on
- 10.14.7.1.2. Driver log-off
- 10.14.7.1.3. Pick-up location arrival
- 10.14.7.1.4. Pick-up performed
- 10.14.7.1.5. Drop-off location arrival
- 10.14.7.1.6. Drop-off performed
- 10.14.7.1.7. Additional passenger boarding
- 10.14.7.1.8. Additional passenger alighting
- 10.14.7.1.9. Rider no-show
- 10.14.7.1.10. Rider cancels at the door
- 10.14.7.1.11. Rider not ready within pick-up window
- 10.14.7.1.12. The MDT unit shall automatically provide odometer reading, time-stamp, and coordinate location with the transmission of each of the message types above.

10.15. Hardware

- 10.15.1. System must be offeror or third-party hosted and may not require hardware or software installation on INCA servers.
- 10.15.2. Vendor, as soon as practical after notice to proceed, shall provide a complete list of technical specifications for up to 15 workstations that will generate best performance in the software's runtime environment.
- 10.15.3. *Mobile Data Terminals/AVL Functionality*
(This portion of the package must be given in a detailed format to allow the agency the ability to reject this portion of the proposal in the event the expense can be lessened from another source.)
 - 10.15.3.1. INCA seeks additional ITS technology deployment by supplying and installing 49 new Mobile Data Terminals on-board system vehicles. It is the intent of this specification to ensure any products in this category offered herein are fully compatible with the vendor's scheduling software product. This capability must be demonstrated through documentation of successful installation of the software and MDT products at other transit locations in the United States.
 - 10.15.3.2. INCA is specifying a complete package, inclusive of MDT hardware, installation services, mounting system components/hardware, all required electrical components, all communication components, and all shipping and delivery costs, as necessary all of which must be included in the bid proposal.
 - 10.15.3.3. This section presents a functional specification; software vendors may elect to use any manufacturer's brand of mobile devices to meet this specification provided it meets the interoperability standards set forth herein. Software vendors will perform the role of technology integrator and will have prime responsibility over the

performance of any component hardware installed under this section.

10.15.3.4. Further, INCA recognizes the rapidly changing pace of innovation in mobile communication and to the greatest extent practical, seeks current state-of-the art technology. The proposed solution will go live with both web-based system and the Mobile Data Terminals simultaneously.

10.15.3.5. Additional minimum specifications regarding the MDTs are set forth below.

10.15.3.5.1.

10.16. Additional Hardware Information

(Must be a separate optional allowable cost for consideration)

10.16.1. Bidder's bid proposal shall include the optional cost of 50 MDT units and related mounting and installation hardware, vehicle cabling, required electrical components, all communication components, inclusive of modems, antennae, and receivers, and all shipping and delivery costs, as necessary.

10.16.2. MDT Unit

10.16.2.1. Supplied MDT units shall meet the following technical specifications:

10.16.2.1.1. Minimum 6" backlit transfective color touch screen with adjustable backlighting

10.16.2.1.2. Audio speaker/adjustable volume

10.16.2.1.3. Integrated GPS receiver with built-in antenna or multi-function Antenna- GPS, 802.11, WAN

10.16.3. General Operating Parameters

10.16.3.1. MDT units must be dust and water resistant

10.16.4. General Functionality

10.16.4.1. MDT units shall function during day-to-day operations under the following requirements:

10.16.4.1.1. Real-time data communication

10.16.4.1.2. Automatic manifest updates

10.16.4.1.3. User defined reporting data intervals

10.16.4.1.4. Track driver behavior, including driving speeds

10.16.4.1.5. Device locking mechanism while vehicle in motion

10.16.4.1.6. Automatic Vehicle Location (AVL)

10.16.4.1.7. Turn-by-turn voice directions

10.16.4.1.8. GPS location, including speed direction, accuracy

10.16.4.1.9. Odometer and mileage tracking

10.16.4.1.10. Real-time and historical vehicle tracking

10.16.4.1.11. Manifest stop listing

10.16.4.1.12. Automatic updates to the manifest in real-time

10.16.4.1.13. Audible tone when the update is received

10.16.4.1.14. Color coding

10.16.4.1.15. Real-time messaging between dispatch and drivers

10.17. Dispatch Interface/GPS/AVL Functionality

10.17.1. In addition to the in-vehicle functionality described above, the bidder's technology solution shall provide the following functionality to system dispatch operations:

10.17.1.1. Event Based Reporting: When a function is performed, the location of the vehicle shall be reported along with any data relevant to the performance of the particular function.

10.17.1.2. Distance Traveled Reporting: Every time the vehicle has moved a predetermined distance the MDT shall automatically report the vehicle's location to the host system in order to avoid unnecessary reports from vehicles that have not moved from their previously reported positions.

10.17.1.3. Time Elapsed Reporting: Vendor shall indicate the frequency of coordinate reporting, based, in part, upon the transmission capacity of the communications infrastructure, costs, etc. If a report is not received at the specified interval, then the host system shall be alerted to the fact that for one reason or another that vehicle is out of coverage.

10.17.1.4. Hybrid GPS Reporting: System may incorporate the advantages of all three of the preceding methods. The requirement of GPS is to receive information ONLY WHEN desired and not waste airtime sending GPS information that is not useful to the dispatch operations.

10.17.1.5. Poll-on-Demand: MDT shall be capable of reporting GPS based on a polling request message from the Host-end Application Software at the dispatch location.

11. PROJECT MANAGEMENT.

11.1. Designation of Manager

11.1.1. The proposer shall name one (1) individual from the firm who shall have complete authority and control over all aspects of customization, data conversion, installation, testing, and training. This individual shall be named in the proposal and a resume of the individual's qualifications to oversee this project shall be detailed. This manager shall have oversight responsibility for all matters with INCA.

11.2. Single Point of Contact

11.2.1. The proposer's project manager shall be the sole point of contact between the vendor and INCA for all business matters concerning the customization, installation, testing, and training phases of this project.

11.2.2. INCA recognizes that other individuals will lead some phases of work during the project. It is INCA's intent, however, to have one individual in

an authoritative position to represent the proposer in all aspects of the project.

11.3. Technical Support

- 11.3.1. INCA requires that the proposer offer one full year of full technical support as part of its base bid proposal. This technical support shall include, but not necessarily be limited to:
 - 11.3.1.1. Phone and email support with service technician/engineer during all normal administrative business hours maintained by Agency name.
 - 11.3.1.2. Provision of diagnostics/repairs via remote control access to system hardware/software.
 - 11.3.1.3. On-site technical support when required.
 - 11.3.1.4. Product upgrades, new releases, patches, etc. when issued by the vendor throughout the first five (5) years of implementation. The product upgrades, new releases, patches, etc. for year 1 must be included in the proposer's base bid. The product upgrades, new releases, patches, etc. for years 2 through 5 should be included as alternates in the bid proposal.
- 11.3.2. INCA shall be given access rights to web-based program of support upon contract signing.
- 11.3.3. If the proposer offers training classes, refresher courses, or sponsors organized user group meetings, such support shall be listed in the vendor's proposal.

11.4. Installation, Testing, and Acceptance

- 11.4.1. *Access to INCA Locations*
 - 11.4.1.1. Throughout the period of software installation, INCA shall have the project lead coordinate with each county to ensure the vendor's local installation efforts are handled accordingly.
- 11.4.2. *Testing*
 - 11.4.2.1. Upon notification of that the system is ready for testing; the purchaser and the vendor will schedule a date for performance testing. Testing shall commence when notified by the vendor that the software is ready for testing.
 - 11.4.2.2. Proposer shall have the Project Manager and/or a duly qualified software engineer on-site during the initial testing of all software products.
 - 11.4.2.3. JAMM Transit shall operate the system in test mode for a minimum of one week, up to a maximum of 30 days, during the testing period. During this time, JAMM Transit shall compile a list of issues, bugs, software glitches, etc., that shall be the responsibility of the vendor to correct during an additional 30-day period.

- 11.4.2.4. If, after testing, software does not perform to specifications or vendor representations, vendor shall be given 30 days after notification of the problem to remedy the issue.
- 11.4.2.5. Upon satisfactory fix of all software bugs, integration problems, etc., JAMM will again commence a final testing period to verify that the vendor has addressed the identified problems.
- 11.4.3. *Acceptance*
 - 11.4.3.1. After final testing is completed to the satisfaction of INCA, INCA's Administrator will issue a letter of acceptance to the vendor.

12. TRAINING.

- 12.1. Vendor shall be required to train up to 25 staff to proficiency on all software products provided. All training shall be conducted on-site at the counties listed within this RFP. The location and all training schedules shall be coordinated with INCA's Operations Director.

12.2. *Training Program*

- 12.2.1. Vendor shall be required to provide a combination of classroom and "hands-on" training for all software products provided. Training content and duration shall be stated specifically in the proposer's written offer in response to this procurement.
- 12.2.2. *Computer Hardware for Training*
 - 12.2.2.1. It shall be the responsibility of INCA to provide the computers necessary for the selected vendor to provide all "hands-on" modules of software training.
- 12.2.3. *Training on Ancillary Software*
 - 12.2.3.1. If the complete system offered by the vendor relies on third party software, it shall be the responsibility of the vendor to provide training, in structure and in content, on that software equal to that provided for its own products.
- 12.2.4. *Work Elements to be Provided/Performed by Agency name*
 - 12.2.4.1. INCA understands that during the performance and execution of any contract arising from this procurement, certain support may be provided to the selected vendor, including, but not necessarily limited to provision of: (1) data, information, and other material needed to populate software system databases, etc.; (2) workspace for the vendor's employees and contractors while performing work on-site; (3) requisite staff for training at a time mutually agreeable to conduct such training; and (4) other implementation support, as necessary.
- 12.2.5. *Manuals and Documentation*
 - 12.2.5.1. Vendor shall provide four copies of the software manuals for each product offered as part of this procurement.
- 12.2.6. *Service design and evaluation*

- 12.2.6.1. Vendor shall provide consulting and analytical services to assist in the evaluation and design of current and future service concepts. The desired cooperation with the vendor would be to ensure that the Vendor's software is able provide analytic data to support the decision making process for INCA. Additionally, auditing services to ensure that the Vendor' software is being used to the fullest to support continuous improvements.
13. **WARRANTY.** Except as expressly stated, at a minimum, the warranty for all items provided shall be manufacturer's minimum standard warranty. Contractor shall be an authorized distributor or manufacturer of the product(s) offered. Contractor shall provide extended warranty options at one-year period increments.
14. **INSTRUCTIONS.**
 - 14.1. The RFP may be obtained electronically at www.incacaa.org/schedulinganddispatchingrfp.
 - 14.2. No oral explanation in regard to the meaning of the specifications will be made, and no oral interpretation will be given before the award of the contract. If any person contemplating submitting a bid for this contract is in doubt as to the true meaning of any part of the specifications or any other proposed contract documents, they may submit to INCA a written request for an interpretation thereof.
 - 14.3. Written questions should be submitted by email to Erica Pogue at e.pogue@incacaa.org with RFP Scheduling and Dispatching Software in the Subject Line to be received no later than **5:00 PM central time on Tuesday, June 23rd, 2019**. All questions and written answers will be posted to the website as an addendum to and become part of this RFP. INCA will not be responsible for any other explanation or interpretations of the proposed documents.
15. **RESPONSE.**
 - 15.1. To be considered, proposals may be submitted electronically or delivered to INCA Community Services to the attention of Erica Pogue, Operations Director on or before June 23rd, 2020 at 5:00 p.m.
 - 15.1.1. Electronic submissions may be used by emailing to e.pogue@incacaa.org. Timestamp will be used from the date and time of the email received. Please use return receipt to show that it has been received. Recommend following up with a telephone call to Erica Pogue.
 - 15.1.2. Delivered proposals must be delivered to INCA Community Services Atoka Office, physical address 371 W. 10th Street, Atoka, OK 74525 or mailing Address is P. O. Box 807, Atoka, OK 74525.
 - 15.1.2.1. Please note that use of U.S. Mail, FedEx, UPS, or other delivery method, does not guarantee delivery to this address by the above-listed time for submission. Proposers mailing proposals

should allow sufficient delivery time to ensure timely receipt of their proposals. If INCA's office location to which proposals are to be delivered is closed on the proposal response date, due to inclement weather, natural disaster, or any other cause, the deadline for submission shall be automatically extended until the next INCA business day on which the office is open. Unless the Proposers are otherwise notified by INCA, the time for submission of proposals shall remain the same.

- 15.2. Proposals must be signed by an official authorized to bind the Proposer to its provisions and include the Proposer's Federal Identification Number. Each proposal page should be numbered for ease of reference.
- 15.3. Proposals should be prepared simply and economically, providing a straightforward, concise description of the Proposer's ability to meet the requirements of the RFP.
- 15.4. Proposals must contain individual pricing for all materials, training, and licenses.
- 15.5. Each and every Proposer submitting a proposal specifically waives any right to withdraw or modify it, except as hereinafter provided. Proposals may be withdrawn by email or written notice received at INCA's address for proposal delivery prior to the exact hour and date specified for proposal receipt. However, if the Proposer chooses to attempt to provide such written notice by telefax transmission, INCA shall not be responsible or liable for errors in telefax transmission. A proposal may also be withdrawn in person by a Proposer or its authorized representative, provided its identity is made known and it signs a receipt for the proposal, but only if the withdrawal is made prior to the exact hour and date set for proposal receipt. A proposal may only be modified by the submission of a new sealed proposal or submission of a sealed modification which complies with the requirements of this RFP.
- 15.6. Although this request provides for a general format, it is not intended to limit a respondent's imagination and creativity in preparing a proposal the respondent feels will best serve the needs of INCA.

16. DISCUSSIONS FOR CLARIFICATION.

- 16.1. Proposers who submit proposals may be required to make an oral or written clarification of their proposals to INCA to ensure thorough mutual understanding and Proposer responsiveness to the solicitation requirements. The Transit Operations Director will initiate requests for clarification.

17. BEST AND FINAL OFFERS.

- 17.1. INCA reserves the right to conduct discussions with Proposers for the purpose of obtaining "best and final offer."
- 17.2. INCA reserves the right to waive formalities and reject any and all proposals.

- 17.3. After the offer has been made, limitations will be made with any discussions to only Proposers whose proposal has determined to be reasonably susceptible of being selected for award.
- 17.4. The selected Proposer will be required to assume responsibility for all services offered in its proposal whether or not it produces them. Further, INCA will consider the selected Proposer to be the sole point of contact with regard to contractual matters.
- 17.5. INCA shall use its best judgment in conducting a comparative assessment of the proposal.
- 17.6. INCA shall select a company that meets the needs of the agency and various contractors.
- 17.7. A company will be selected and notification will be made to all companies submitting proposals on or before 5:00 PM., June 30th, 2020.

18. FEDERAL CONTRACT CLAUSES.

18.1. No Federal Government Commitment or Liability to Third Parties

- 18.1.1. Except as the Federal Government expressly consents in writing, the Contractor agrees that:

- 18.1.1.1. The Federal Government does not and shall not have any commitment or liability related to the Underlying Agreement, to any Third Party Participant at any tier, or to any other person or entity that is not a party (FTA or the Contractor) to the Underlying Agreement, and

- 18.1.1.2. Notwithstanding that the Federal Government may have concurred in or approved any Solicitation or Third Party Agreement at any tier that may affect the Underlying Agreement, the Federal Government does not and shall not have any commitment or liability to any Third Party Participant or other entity or person that is not a party (FTA or the Contractor) to the Underlying Agreement.

18.2. False or Fraudulent Statements or Claims.

- 18.2.1. Civil Fraud. The Contractor acknowledges and agrees that:

- 18.2.1.1. Federal laws, regulations, and requirements apply to itself and its Underlying Agreement, including the Program Fraud Civil Remedies Act of 1986, as amended, 31 U.S.C. § 3801 et seq., and U.S. DOT regulations, "Program Fraud Civil Remedies," 49 C.F.R. part 31.

- 18.2.1.2. By executing the Underlying Agreement, the Contractor certifies and affirms to the Federal Government the truthfulness and accuracy of any claim, statement, submission, certification, assurance, affirmation, or representation that the Contractor provides to the Federal Government.

- 18.2.1.3. The Federal Government may impose the penalties of the Program Fraud Civil Remedies Act of 1986, as amended, and other applicable penalties if the Contractor presents, submits, or makes available any false, fictitious, or fraudulent information.
 - 18.2.2. Criminal Fraud. The Contractor acknowledges that 49 U.S.C. § 5323(l)(1) authorizes the Federal Government to impose the penalties under 18 U.S.C. § 1001 if the Contractor provides a false, fictitious, or fraudulent claim, statement, submission, certification assurance, or representation in connection with a federal public transportation program under 49 U.S.C. chapter 53 or any other applicable federal law.
- 18.3. **Access to Contractor and Third Party Participant Records.**
 - 18.3.1. The Contractor agrees and assures that each Subcontractor, if any, will agree to:
 - 18.3.1.1. Provide, and require its Third Party Participants at each tier to provide, sufficient access to inspect and audit records and information related to its Award, the accompanying Underlying Agreement, and any Amendments thereto to the U.S. Secretary of Transportation or the Secretary's duly authorized representatives, to the Comptroller General of the United States, and the Comptroller General's duly authorized representatives, and to the Contractor and each of its Subcontractors,
 - 18.3.1.2. Permit those individuals listed above to inspect all work and materials related to its Award, and to audit any information related to its Award under the control of the Contractor or Third Party Participant within books, records, accounts, or other locations, and
 - 18.3.1.3. Otherwise comply with 49 U.S.C. § 5325(g), and federal access to records requirements as set forth in the applicable U.S. DOT Common Rules.
- 18.4. **Federal Changes**
 - 18.4.1. The Contractor shall at all times comply with all applicable Federal regulations, policies, procedures and directives, including without limitation those listed directly or by reference in the Master Agreement as amended or promulgated from time to time during the term of this contract.
- 18.5. **Civil Rights Requirements**
 - 18.5.1. The Contractor agrees that it must comply with applicable federal civil rights laws, regulations, and requirements, and follow applicable federal guidance, except as the Federal Government determines otherwise in writing. Therefore, unless a Contractor or a federal program, including the Tribal Transit Program or the Indian Tribe Contractor, is specifically exempted from a civil rights statute, FTA requires compliance with that civil rights statute, including compliance with equity in service.

- 18.5.2. Nondiscrimination in Federal Public Transportation Programs. The Contractor agrees to, and assures that it and each Third Party Participant, will:
 - 18.5.2.1. Prohibit discrimination on the basis of race, color, religion, national origin, sex (including gender identity), disability, or age.
 - 18.5.2.2. Prohibit the:
 - 18.5.2.2.1. Exclusion from participation in employment or a business opportunity for reasons identified in 49 U.S.C. § 5332,
 - 18.5.2.2.2. Denial of program benefits in employment or a business opportunity identified in 49 U.S.C. § 5332, or
 - 18.5.2.2.3. Discrimination identified in 49 U.S.C. § 5332, including discrimination in employment or a business opportunity identified in.
- 18.5.3. Follow:
 - 18.5.3.1. The most recent edition of FTA Circular 4702.1, "Title VI Requirements and Guidelines for Federal Transit Administration Contractors," to the extent consistent with applicable federal laws, regulations, requirements, and guidance, and other applicable federal guidance that may be issued, but
 - 18.5.3.2. FTA does not require an Indian Tribe to comply with FTA program-specific guidelines for Title VI when administering its Underlying Agreement supported with federal assistance under the Tribal Transit Program.
 - 18.5.3.3. Nondiscrimination – Title VI of the Civil Rights Act. The Contractor agrees to, and assures that each Third Party Participant, will:
 - 18.5.3.3.1. Prohibit discrimination on the basis of race, color, or national origin,
- 18.5.4. Comply with:
 - 18.5.4.1. Title VI of the Civil Rights Act of 1964, as amended, 42 U.S.C. § 2000d et seq.,
 - 18.5.4.2. U.S. DOT regulations, "Nondiscrimination in Federally-Assisted Programs of the Department of Transportation – Effectuation of Title VI of the Civil Rights Act of 1964," 49 C.F.R. part 21, and
 - 18.5.4.3. Federal transit law, specifically 49 U.S.C. § 5332, and
- 18.5.5. Follow:
 - 18.5.5.1. The most recent edition of FTA Circular 4702.1, "Title VI Requirements and Guidelines for Federal Transit Administration Contractors," to the extent consistent with applicable federal laws, regulations, requirements, and guidance,
 - 18.5.5.2. U.S. DOJ, "Guidelines for the enforcement of Title VI, Civil Rights Act of 1964," 28 C.F.R. § 50.3, and
 - 18.5.5.3. All other applicable federal guidance that may be issued.
- 18.6. Equal Employment Opportunity.

- 18.6.1. Federal Requirements and Guidance. The Contractor agrees to, and assures that each Third Party Participant will, prohibit, discrimination on the basis of race, color, religion, sex, sexual orientation, gender identity, or national origin, and:
- 18.6.2. Comply with Title VII of the Civil Rights Act of 1964, as amended, 42 U.S.C. § 2000e et seq.,
- 18.6.3. Facilitate compliance with Executive Order No. 11246, "Equal Employment Opportunity" September 24, 1965, 42 U.S.C. § 2000e note, as amended by any later Executive Order that amends or supersedes it in part and is applicable to federal assistance programs,
- 18.6.4. Comply with federal transit law, specifically 49 U.S.C. § 5332, as provided in section 12 of this Master Agreement,
- 18.6.5. FTA Circular 4704.1 "Equal Employment Opportunity (EEO) Requirements and Guidelines for Federal Transit Administration Contractors," and
- 18.6.6. Follow other federal guidance pertaining to EEO laws, regulations, and requirements, and prohibitions against discrimination on the basis of disability,
- 18.7. Specifics. The Contractor agrees to, and assures that each Third Party Participant will:
 - 18.7.1. Prohibited Discrimination. Ensure that applicants for employment are employed and employees are treated during employment without discrimination on the basis of their race, color, religion, national origin, disability, age, sexual orientation, gender identity, or status as a parent, as provided in Executive Order No. 11246 and by any later Executive Order that amends or supersedes it, and as specified by U.S. Department of Labor regulations,
 - 18.7.2. Affirmative Action. Take affirmative action that includes, but is not limited to:
 - 18.7.2.1. Recruitment advertising, recruitment, and employment,
 - 18.7.2.2. Rates of pay and other forms of compensation,
 - 18.7.2.3. Selection for training, including apprenticeship, and upgrading, and
 - 18.7.2.4. Transfers, demotions, layoffs, and terminations, but
 - 18.7.3. Indian Tribe. Recognize that Title VII of the Civil Rights Act of 1964, as amended, exempts Indian Tribes under the definition of "Employer," and
 - 18.7.4. Equal Employment Opportunity Requirements for Construction Activities. Comply, when undertaking "construction" as recognized by the U.S. Department of Labor (U.S. DOL), with:
 - 18.7.5. U.S. DOL regulations, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor," 41 C.F.R. chapter 60, and

- 18.7.6. Executive Order No. 11246, "Equal Employment Opportunity in Federal Employment," September 24, 1965, 42 U.S.C. § 2000e note, as amended by any later Executive Order that amends or supersedes it, referenced in 42 U.S.C. § 2000e note.

18.8. Incorporation Of Federal Transit Administration (FTA) Terms

- 18.8.1. The preceding provisions include, in part, certain Standard Terms and Conditions required by DOT, whether or not expressly set forth in the preceding contract provisions. All contractual provisions required by DOT, as set forth in the most current FTA Circular 4220, are hereby incorporated by reference. Anything to the contrary herein notwithstanding, all FTA mandated terms shall be deemed to control in the event of a conflict with other provisions contained in this Agreement. The Contractor shall not perform any act, fail to perform any act, or refuse to comply with any NCTD requests which would cause NCTD to be in violation of the FTA terms and conditions.

18.9. Right of the Federal Government to Terminate

- 18.9.1. Justification. After providing written notice to the Contractor, the Contractor agrees that the Federal Government may suspend, suspend then terminate, or terminate all or any part of the federal assistance for the Award if:
 - 18.9.1.1. The Contractor has failed to make reasonable progress implementing the Award,
 - 18.9.1.2. The Federal Government determines that continuing to provide federal assistance to support the Award does not adequately serve the purposes of the law authorizing the Award, or
 - 18.9.1.3. The Contractor has violated the terms of the Underlying Agreement, especially if that violation would endanger substantial performance of the Underlying Agreement.
- 18.9.2. Financial Implications. In general, termination of federal assistance for the Award will not invalidate obligations properly incurred before the termination date to the extent that the obligations cannot be canceled. The Federal Government may recover the federal assistance it has provided for the Award, including the federal assistance for obligations properly incurred before the termination date if it determines that the Contractor has misused its federal assistance by failing to make adequate progress, failing to make appropriate use of the Project property, or failing to comply with the Underlying Agreement, and require the Contractor to refund the entire amount or a lesser amount, as the Federal Government may determine including obligations properly incurred before the termination date.
- a. Expiration of the Period of Performance. Except for a Full Funding Grant Agreement, expiration of any period of performance established for the Award does not, by itself, constitute an expiration or termination of the Award; FTA may

extend the period of performance to assure that each Formula Project or related activities and each Project or related activities funded with “no year” funds can receive FTA assistance to the extent FTA deems appropriate.

B. Debarment and Suspension

- a. The Contractor agrees to the following:
- b. It will comply with the following requirements of 2 C.F.R. part 180, subpart C, as adopted and supplemented by U.S. DOT regulations at 2 C.F.R. part 1200.
- c. It will not enter into any arrangement to participate in the development or implementation of the Underlying Agreement with any Third Party Participant that is debarred or suspended except as authorized by:
 - i. U.S. DOT regulations, “Nonprocurement Suspension and Debarment,” 2 C.F.R. part 1200,
 - ii. U.S. OMB regulatory guidance, “Guidelines to Agencies on Government wide Debarment and Suspension (Nonprocurement),” 2 C.F.R. part 180, including any amendments thereto,
 - iii. Executive Orders No. 12549, “Uniform Suspension, Debarment or Exclusion of Participants from Procurement or Nonprocurement Activity,” October 13, 1994, 31 U.S.C. § 6101 note, as amended by Executive Order No. 12689, “Debarment and Suspension,” August 16, 1989, 31 U.S.C. § 6101 note, and
 - iv. Other applicable federal laws, regulations, or guidance regarding participation with debarred or suspended Contractors or Third Party Participants.
- d. It will review the U.S. GSA “System for Award Management – Lists of Parties Excluded from Federal Procurement and Nonprocurement Programs,” <https://www.sam.gov>, if required by U.S. DOT regulations, 2 C.F.R. part 1200.
- e. It will include, and require each Third Party Participant to include, a similar provision in each lower tier covered transaction, ensuring that each lower tier Third Party Participant:
 - i. Complies with federal debarment and suspension requirements, and
 - ii. Reviews the SAM at <https://www.sam.gov>, if necessary to comply with U.S. DOT regulations, 2 C.F.R. part 1200.
- f. If the Contractor suspends, debars, or takes any similar action against a Third Party Participant or individual, the Contractor will provide immediate written notice to the:
 - i. FTA Regional Counsel for the Region in which the Contractor is located or implements the Underlying Agreement,
 - ii. FTA Headquarters Manager that administers the Grant or Cooperative Agreement, or
 - iii. FTA Chief Counsel.

C. Prompt Payment and Return of Retainage

- a. The entity utilizing this Contract declines to hold retainage from prime contractor and requires a contract clause obligating the prime contractor to make prompt

and full payment of any retainage kept by a prime contractor to the subcontractor within 30 days after the subcontractor's work is satisfactorily completed.

D. DISADVANTAGE BUSINESS ENTERPRISE (DBE)

- a. The national goal for participation of Disadvantaged Business Enterprises (DBE) is 10%. ODOT's DBE transit goal for FFY 2017-2019 is 0%. A separate contract specific goal has not been established for this procurement.
- b. Proposers that have DBE firms participating on this contract should provide the following information:
 - i. The names and address of DBE that will participate in this contract.
 - ii. A description of the work each DBE will perform.
 - iii. The dollar amount of the participation of each DBE firm participating.
 - iv. Written documentation of the bidder/offeror's commitment to use a DBE subcontractor.
 - v. Written confirmation from the DBE that it is participating in the contract as provided in the prime contractor's commitment.
 - vi. The successful contractor will be required to report its DBE participation obtained throughout the period of performance.
 - vii. More information on required DBE documentation is available in Federal Clauses.

Attachment A

Ridership Data Import

Upload a CSV file using the form above containing desired ridership data. After uploading, you will have a chance to confirm before any data is imported. Multiple riders sharing trip data will be grouped into a single trip. Download the sample file to see an example of what data to include and how to format the data.

If you are manually entering data in Microsoft Excel, cells should be formatted as text to prevent issues with leading zeroes. To do this select cells, right-click, choose 'Format Cells', select 'Text', and click 'OK'.

The following fields must be present in the uploaded file:

Trip Identification:

- County: Make sure to include leading zeroes. County '01' is different from county '1'.
- Route: Make sure to include leading zeroes. Route '01' is different from route '1'.
- Date: Format date as MM/DD/YYYY. Example: 5/5/2020
- Driver
- Vehicle: Specify the vehicle ID of the desired vehicle
- Beginning Odometer: Must be a decimal number. Cannot overlap Ending Odometer.
- Ending Odometer: Must be a decimal number. Cannot overlap Beginning Odometer.
- Hours of Service: Must be a valid time in format HH:MM.

On-Demand Route:

- Origin
- Destination
- Passenger Type: Specify a single character. G=General, E=Elderly, D=Disabled, B= Both Elderly and Disabled
- Core Code: Specify a valid core code. If your project uses sub codes this can be left blank and core code will be automatically determined.
- Sub Code: If your project uses sub codes, specify a valid sub code. If not, this should be left blank.
- Fare Pass: Enter TRUE if the rider used a fare pass. If a fare pass is used, no Fare Money should be entered.
- Fare Money: Enter a decimal value (with no \$ symbol). If a fare pass is used, no Fare Money should be entered.
- Sponsored: Enter TRUE if the rider requested the ride through a sponsored service.
- Cash Collected: Enter a decimal value (with no \$ symbol).
- Pickup Odometer: Must be a decimal number. Cannot overlap beginning/ending odometers.
- Dropoff Odometer: Must be a decimal number. Cannot overlap beginning/ending odometers.
- Call In Time: Optional. Must be a valid time.
- Pickup Time: Optional. Must be a valid time.
- Dropoff Time: Optional. Must be a valid time.

Fixed Route:

- Passenger Count: Must be a valid integer value.
- Elderly Count: Must be a valid integer value.
- Disabled Count: Must be a valid integer value.
- Elderly & Disabled Count: Must be a valid integer value.
- Fare Passes: Must be a valid integer value.
- Fare Money: Must be a valid decimal value.
- Passenger Miles: Must be a valid decimal value.

Attachment B

County	Route	Date	Driver	Vehicle	Begin Odometer	End Odometer	Hours of Service	Origin	Destination	Passenger Type
13	AA	1/3/2012	Bob	CAR1	300	200	10:30	Home	There	G
13	AA	1/3/2012	Bob	CAR1	300	200	10:30	Store	Mail	E
13	AA	1/3/2012	Bob	CAR1	300	200	10:30			D
14	26	1/8/2012	John	CAR2	300	300	8:15			
13	AA	1/5/2012	Bob	CAR1	400	500	9:45			B
13	AA	1/5/2012	Bob	CAR1	400	500	9:45	Home	Hospital	G
13	AA	1/5/2012	Bob	CAR1	400	500	9:45			D

Core Code	Sub Code	Sponsored	Fare Pass	Fare Money	Cash Collected	Pickup Odometer	Dropoff Odometer	Call In Time
MED	ABC	TRUE	TRUE			105	125	
EDU	DEF		TRUE			110	145	12:00
MED	ABC	TRUE		12.34		150	175	
MED	ABC			1.55	20.5	400	410	
EMP	GHI	TRUE		2.36		420	430	
EDU	JKL			1.14		440	450	

Pickup Time	Dropoff Time
12:15	12:45

Attachment C

SECTION 5311 - RURAL TRANSIT DATA COLLECTION SHEET						Page _____ of _____				
DEMAND RESPONSE ROUTE										
<p>* Indicates information required by ODOT. All Pick Up and Drop Off Odometer readings must be shown to the tenth of a mile. All Pick Up and Drop Off Odometer readings must be shown to the tenth of a mile. Round up all Total Hours and Grand Total Hours to the nearest 15 minutes.</p>										
*TRANSIT NAME: _____				*DRIVER'S NAME: _____						
*DATE: ____ / ____ / ____		*VEHICLE #: _____		*ENDING ODOMETER: _____						
*PASSENGER SEATS: _____		*ROUTE ID: _____		*BEGINNING ODOMETER: _____						
*TIME IN: ____:____		*TIME OUT: ____:____		*TOTAL HOURS: ____:____						
*TIME IN: ____:____		*TIME OUT: ____:____		*TOTAL HOURS: ____:____		*GRAND TOTAL HOURS: ____:____				
NAME / ORIGIN	DESTINATION	*PASS. TYPE	*PURPOSE CODES		FARE		*ODOMETER		TIMES	
			Sub-Code	Core-Code	Cash	Pass	*Pick Up	*Drop Off	Pick Up	Drop Off

PASSENGER TYPE CODE: G-General Public, D-Disabled, E-Elderly Passenger, H-Elderly Passenger with Disability

CORE CODES: EDU-Education, EMP-Employment, MED-Medical, QTR-Other/Response, REC-Recreation, SHP-Shopping

SUB-CODES: Sub-Codes are established by the local operator and are used to identify a specific purpose for which the trip is being taken and for the purposes of later generating a report to illustrate the types and passenger types that make the specified trip(s).

DRIVER'S CERTIFICATION: I certify that the foregoing is a true and correct accounting of services provided.

*Driver's Signature: _____ Date: _____