

**Contract Management Oversight Consultant Services for the  
East Bay Paratransit Consortium**

**Request for Information**

**January 2025**

## 1 Summary

The East Bay Paratransit Consortium (EBPC), a joint powers authority of the San Francisco Bay Area Rapid Transit District (“District” or “BART”) and with the Alameda Contra Costa Transit District (AC Transit), is planning to procure contract management oversight services (“the Services”) for the EBPC, including oversight, operational monitoring, administrative, and financial services. This Request for Information (RFI) will help the EBPC refine requirements for the Services and inform assessment of alternative options for the procurement approach, in advance of considering a Request for Proposals (RFP).

This RFI is not part of a procurement. Participation is optional and solely at the responding firm’s own expense. Failure to respond to the RFI will not preclude any firm from participating in any subsequent formal procurement. Following completion of the RFI process, the Agencies will have no obligation to the participants of this RFI regarding procurement of goods or services. Information submitted by a vendor as part of this RFI will not be considered in the selection and award in a future procurement.

## 2 Background

East Bay Paratransit Consortium (EBPC) started operations in 1996 under a joint agreement between AC Transit and the San Francisco Bay Area Rapid Transit District (BART) to provide paratransit services mandated by the Americans with Disabilities Act (ADA) throughout the overlapping service areas of the two transit agencies.

EBPC serves the East Bay communities of Western Contra Costa County, Alameda County, and into and out of San Francisco within the AC Transit/BART overlapping service areas. EBP is currently operated by a contracted Broker who provides booking, scheduling, dispatch, eligibility, call center and customer services support. The Broker in turn subcontracts with service providers for the operation of dedicated lift vans and taxis.

Since inception, the EBPC has contracted with an independent oversight entity (“the Contractor”) to provide a neutral, central point of contact between AC Transit and BART (“the Agencies”) and assist with contract management. The contractor focuses exclusively on EBPC issues providing the critical function of impartial, independent review for accuracy and the tracking of trends and indicators in the Broker’s performance, service quality and budget. This function is well received by both internal and external auditors as an effective method of providing checks and balances to the EBPC.

The EBPC's current contract for these services expires on June 30, 2025, with an optional extension of one year to June 30, 2026. Historically, the contract has been structured as a five-year base contract with extension options.

### 3 Purpose

The purpose of this RFI is to obtain feedback and input from interested firms and professionals on the best ways to deliver the set of skills needed to support the Agencies' oversight of the contracted paratransit service, to inform structuring of the RFP for the new contract.

In the past these Services were provided by a single contractor with expertise paratransit operations and regulatory requirements. Ideally the agencies would like to continue to have the services provided under a single contract but it is possible that after gathering information from this RFI, separate contracts for the different functional areas may be the best option. The main functional support areas envisioned at this time are outlined in Attachment A and include:

- Management oversight
- Operational monitoring support
- Administrative support
- Financial analysis support

Additionally, EBP is in the process of transitioning to a new robust scheduling and reporting software which will remove some of the basic data gathering and report generation work performed by the current contractor. The new contractor will be able to use the new software reporting features to provide analysis and recommendations to improve service and propose cost saving strategies.

### 4 RFI Schedule

The RFI process will follow the schedule described in Table 1. All dates are subject to change at EBPC's discretion.

Table 1: RFI Schedule

ITEM	DATE
RFI Issuance	January 6, 2025
RFI Response Requested by	January 20, 2025
One-on-One Discussions	TBD / week of Jan 27 <sup>th</sup>

To ask questions regarding the RFI, please contact Ryan Greene-Roesel, Manager of Access and Accessible Services at BART ([rgreene@Bart.gov](mailto:rgreene@Bart.gov)). Please submit responses on or before 5:00 P.M. PDT on January 20, 2025. Receipt of all email submissions will be confirmed within one business day. After review of all responses, it is solely at the Agencies' discretion to arrange one-on-one discussions with one or more of the respondents. The discussions are tentatively planned for the week of January 27, 2025 and may be in-person or virtual.

## 5 Form of Response and Questions

Please review **Attachment A**, "Contractor Tasks and Desired Experience" and fill in the brief RFI questionnaire **Attachment B**. Submit it in Word or PDF format along with any desired supporting materials.

Please note that BART and AC Transit are subject to the California Public Records Act (Government Code Sections 7920 et seq.) and any documents submitted shall be subject to public inspection and copying pursuant to the California Public Records Act. Respondents should specifically identify any portion of the information provided in response to the RFI or during any one-on-one discussions which they deem to be confidential or proprietary information. Upon request, the respondent will be required to provide justification and defense of the respondent's position that such material should not be disclosed by the District under the California Public Records Act. Any questions that the respondent may have with respect to confidential or proprietary information should be directed to their own legal counsel.

# Attachment A: Contractor Tasks and Desired Experience

This attachment lists the expected contractor responsibilities for the four main areas of work (oversight, operations, monitoring, administrative support, and financial analysis) and the desired contractor experience for each.

## (1) Contract Oversight Management

### Responsibilities:

- Provide comprehensive ongoing review and evaluation of East Bay Paratransit contracted service.
- Act as a liaison between the Project Managers of both Agencies and provide support as needed in response to Agency requests and Customer Complaints.
- Meet weekly with Agency program managers and identify areas of concern that need addressing.
- Provide analysis and recommendations to ensure EBPC's goals of ADA compliance and the provision of cost-effective, safe, convenient, reliable, and user-friendly paratransit service are met.
- Provide oversight and coordination of the other key functional support areas of: Operational monitoring, Administrative, Financial analysis.
- Assist with special projects/research such as identifying transit agency best practices; analyzing broker office relocation costs; preparing supporting documentation for upcoming procurements; preparing supporting materials for grant proposals; or analyzing changes to structure or operations.

### Desired Experience

- Knowledge and experience working with the Americans with Disabilities Act and other accessibility regulations and codes as applied to ADA Paratransit.
- Experience working with persons with disabilities and/or seniors.
- Ability to review and evaluate paratransit operation data to identify trends, areas of concern to provide recommendations for improvements and cost saving strategies.
- Knowledge and experience with the reporting and audit requirements for ADA Paratransit, including but not limited to, the Federal Transit Administration (FTA).

- Experience in creating proposals, plans and policy recommendations for transportation operation with specific emphasis on accessibility for seniors and persons with disabilities.
- Experience with grant submittals, administration and/or management.
- Management experience with processes of administrative, organizational, financial, economic, and procedural analysis.
- Skill in negotiation and consensus building

## (2) Operations Monitoring

### Responsibilities

- Develop and implement an Operations Monitoring program to monitor the contracted paratransit Broker and Service Providers for contract compliance.
- Review performance measures and identify trends and areas of concern to escalate to the contract program manager and agency program managers
- Provide independent road supervision of the broker's subcontractor(s) and and/or independent review of the application of liquidated damages on the broker's subcontractors
- Conduct site visits/inspections of the broker and provider facilities and ride-alongs on vehicle trips.
- Review the Broker's record keeping, standard operating procedures, and maintenance records.

### Desired Experience

- Experience with contract compliance monitoring, including experience performing field checks.
- Experience monitoring drivers, maintenance yards, and vehicles.
- Knowledge and experience working with the Americans with Disabilities Act and other accessibility regulations and codes as applied to ADA Paratransit.

## (3) Administration & Customer Service

### Responsibilities

- Staff the customer advisory group for bi-monthly East Bay paratransit (the East Bay Paratransit Access Committee):
  - Schedule meetings, prepare agendas and notices

- Package and distribute materials, set up meeting rooms, review and assist with sharing presentations, provide committee members with support in accessing the meeting, attend meetings and take minutes
- Manage recruitment of new members and appointment of committee officers.
- Maintain a list of topics for future agendas.
- Manage escalated customer complaints:
  - Maintain a separate phone number and mailing address for customers to submit complaints and commendations outside of the Broker and EBPC's complaint process.
  - Research and track escalated complaints, and develop responses as directed by Program Management staff, and maintain records of such complaints
- Provide general administrative support:
  - Schedule and attend Agency Program Managers/EBP staff meetings, weekly and as needed, including providing meeting agendas and minutes.
  - Maintain a centralized and complete set of program records, policies and procedures.
  - Provide/package operational data into reports, if not provided automatically by software
  - Prepare and maintain a centralized calendar of meetings, activities, & reporting deadlines.
  - Support preparation and submittal of grants, funding reports and annual plan documents for external funding sources.

## Experience

- Proficiency with Microsoft Office Suite and video conferencing software.
- Experience staffing public meetings/working with the public, ideally with the senior and disabled community
- Experience providing customer service and explaining rules and regulations to the public
- Ability to evaluate customer complaints and questions and making appropriate responses or referrals for handling.
- Ability to project a courteous, patient, helpful and positive attitude when dealing with customers.

- Experience extracting data from software, ideally paratransit software, for reporting purposes.
- Ability to communicate clearly and concisely, both orally and in writing.
- Ability to maintain accurate records and files.
- General administrative experience

## (4) Financial Forecasting and Budgeting Services

### Responsibilities

- Review and compile budget updates provided by the broker or paratransit software and prepare financial updates to track budget performance on a monthly basis. Provide explanations for any increases/decreases & variance explanations.
- Prepare annual EBPC level of service demand and budget estimates for submittal to Program Management staff. This should include future projections, forecasts, and year-to-date comparisons.
- Respond to requests for data & performance analyses to support Program Management staff with midyear revisions & adjustments.
- Monitor charges and invoicing based on Incentive/Disincentives.
- Provide analysis of Service Providers' rate/range evaluation and distribution of work among providers biannually.
- Provide an annual capital budget using projections of future needs to support the Broker Office and continued operations.
- Analyze any proposed increase to fares and the potential impacts.
- Prepare multiyear cost performance reports for STA and TDA.

### Desired Experience

- Budget management, including budget planning, development, analysis, administration and control skills.
- Strong analytical skills, excellent communication skills, and the ability to work independently.
- Desired experience in public sector organization and/or familiarity with transit or transportation systems.
- Effective written and oral communication skills.
- Effective research and analytical skills.
- Proficiency in Microsoft Office Suite programs, specifically Excel and PowerPoint.



- Knowledge of:
  - Principles and practices of budget preparation and administration.
  - Methods and techniques of statistical and financial analysis.
  - Collecting, evaluating and interpreting complex information and data.
  - Preparing clear and concise administrative, budgetary, and financial reports.
  - Preparing accurate and financial and budget complete reports and other brief correspondence.