



# Request for Employee Shuttle Service

REQUEST FOR PROPOSAL  
(RFP) NO. 132863

Deadline to Submit Proposals:  
July 21<sup>st</sup>, 2018



**TABLE OF CONTENTS**

**INTRODUCTION..... 1**

**BACKGROUND ..... 1**

**RFP SCHEDULE..... 1**

**SCOPE OF WORK..... 1**

**COST AND FEES..... 5**

**PAYMENT SCHEDULE ..... 5**

**EVALUATION AND SELECTION PROCESS ..... 5**

**TERMS OF AGREEMENT ..... 6**

**RFP SUBMISSION REQUIREMENTS..... 6**

**INSTRUCTION FOR SUBMITTAL OF PROPOSALS ..... 8**

**INSURANCE AND CONTRACT REQUIREMENTS ..... 9**

**EXHIBITS ..... 11**

## 1. Introduction

Carmel Partners Inc. is seeking proposals from qualified shuttle operators to provide vehicles and drivers for a program using commuter shuttles from the Caltrain and Embarcadero Stations. The successful operator will be awarded a one-year contract with an option to renew.

## 2. Background

Carmel Partners Inc. is a real estate development firm based in San Francisco. The office is located on the outskirts of the Financial District. Eighty percent of the 200 employees commute in via BART or Caltrain. The Carmel Partners Board of Directors directed staff to initiate a shuttle service to transport its employees from Caltrain and BART to encourage a safe and efficient commute to work. The shuttle would operate on a roughly 3.8 mile fixed-route loop with three approved stops along the way. Program hours would be Mondays through Fridays from 8:30 a.m. to 9:30 a.m. and 5:30 p.m. to 6:20 p.m.

## 3. RFP Schedule:

This request for proposal will be governed by the following (tentative) schedule:

- [A] Release of RFP document July 7, 2018
- [B] Deadline for Proposers' Response July 21, 2018
- [C] Proposal Evaluation July 28, 2018
- [D] Site visits/Interviews if needed July 30, 2018
- [E] Vendor Selection and Notification August 1, 2018
- [F] Carmel Partners Approval of Contract August 5, 2018
- [H] Contract Start Date On or after August 15, 2018

## 4. Scope of Work:

Carmel Partners Inc. is seeking a qualified shuttle service organization to provide vehicles and drivers to operate a one-year shuttle service within San Francisco city limits. Specifically, destinations are labeled A through C in the map called "Exhibit A." These services shall commence on August 15, 2018 or upon agreement by the negotiating parties and a signed and executed contract.

Carmel Partners Inc. has not made a determination of the type of vehicle to use for this program. That determination will be made through this RFP process. Submitters are encouraged to submit multiple fleet options with pricing for the Carmel Partners Inc.'s consideration provided they meet the requirements set forth in this RFP and can accommodate a minimum of 20 riders inclusive of the Americans with Disabilities Act (ADA) requirements. Note that preference will be given to vehicles using alternative fueling sources for gasoline.

#### *4.1 Service Operations:*

The route for the one-year contract is at CONTRACTOR's discretion and should be included in the proposal. CONTRACTOR will arrive and depart to/from all destinations at the time specified in tables called "Exhibit B." Shuttle hours of operation will be from 8:30 a.m. to 9:30 a.m., and 5:30 p.m. to 6:20 p.m. Mondays through Fridays.

[A] The CONTRACTOR shall be responsible for the operations of shuttle services in accordance with:

- Applicable federal, state, and local laws and regulations;
- Necessary driver qualifications;
- Equipment operating instructions issued by the OEM (original equipment manufacturer);
- Compliance with FTA Drug and Alcohol testing requirements.

CONTRACTOR shall set uniform dress standards for all service employees.

#### [B] Training

CONTRACTOR will establish and provide continuing training programs for all service employees. At a minimum, training shall include ADA lift and secure training, sensitivity training, and defensive driver training.

#### [C] Non-Scheduled Stops

Shuttle service vehicles shall not be used to pick-up or drop-off passengers or CONTRACTOR employees at unscheduled locations without prior written authorization from Carmel Partners Inc., except in case of emergency, equipment failure, or direction of civil authorities.

#### [D] Spare Vehicles

The CONTRACTOR shall dispatch a spare vehicle in the event of a vehicle breakdown. Carmel Partners Inc. also reserves the right to establish additional criteria regarding reliability of response in the event of breakdowns.

#### [E] Vehicle Operators

Vehicle operators will work on a schedule that ensures a consistent and overall quality of service. Vehicle operators must have a valid California Drivers' License. Vehicle operators must be trained in all operational procedures relating to the system. Training must include techniques for dealing with the public in a helpful and courteous manner, basic information about the service, and sensitivity training.

#### *4.2 Code of Conduct:*

CONTRACTOR shall set personnel policies prohibiting unethical actions. Examples of unethical conduct include, but are not limited to, the following:

- Any instance of use of language that is obscene, risqué or religiously, ethnically or sexually demeaning, or making light of physical or mental disability, regardless of whether it is directed at a customer or another employee;

- Any instance of belligerency or malicious behavior toward a customer or another employee;
- Eating in the presence of passengers or on shuttle buses;
- Smoking in the presence of passengers;
- Willful failure to assist customers;
- Reckless or unsafe driving.

All personnel shall be trained to provide excellent customer service and to respond in a professional manner.

#### *4.3 Experience:*

CONTRACTOR shall have, at a minimum, five (5) years of experience providing shuttle service.

#### *4.4 Rolling Stock:*

##### [A] Age of Vehicles

When providing a list of proposed vehicles, include the age of the vehicle within the proposal.

##### [B] ADA Access

All vehicles used for shuttle service must meet ADA requirements for public transit service. All vehicles used for shuttle service must be wheelchair accessible and must be configured to transport at least two (2) wheelchair passengers at any one time without requiring wheelchair passengers to transfer.

##### [C] Vehicle Inventory

CONTRACTOR shall provide Carmel Partners Inc. a detailed inventory of primary vehicles to be used for the shuttle services required herein including at least one (1) spare. Said inventory list shall include the shuttle number, Vehicle Identification Number, month and year of chassis manufacture, make, model, wheelchair capacity, seated capacity with two (2) wheelchair positions in use, maximum seated capacity, and a description of wheelchair accessibility features (ramp, lift, securing system).

##### [D] State and Federal Rules and Regulations

All vehicles providing services under this Agreement shall meet all applicable State and Federal rules and regulations and may be modified from time to time.

##### [E] Identification

Primary Vehicles shall display removable signage/logo provided by Carmel Partners Inc. This signage may be removable magnetic signage that can be removed when not in use, or a full vehicle wrap depending on the type of vehicle proposed and the availability of the vehicle proposed. This signage shall be displayed on the two sides of the primary vehicles at all times during shuttle service operations as well as on the front and rear of the vehicle, if applicable. The Carmel Partners Inc. reserves the right to modify this signage depending on the type of vehicle selected. All signage/logo shall be removed when vehicles are not in use for the Carmel Partners Inc. shuttle service.

[F] Vehicle Seating Requirements

Carmel Partners Inc. will require a minimum seating capacity of 20 passengers including 2 wheelchairs. Preference will be given to those vehicles that provide between 20-25 seats in total.

*4.5 Vehicle Maintenance Plan and Practice:*

At all times, the CONTRACTOR shall maintain all components of each vehicle including its body, frame, furnishing, mechanical, electrical, hydraulic or other operating systems in proper working condition free from damage and malfunction. The CONTRACTOR shall replace and repair immediately any vehicle damaged in any accident or other damage which impairs the proper and safe mechanical operation of the vehicle.

[A] Daily Repairs

The passenger amenities and safety appliances listed below shall be functionally inspected each calendar day on all vehicles which are dispatched for shuttle service and/or Extra service.

Defects shall be remedied as an integral part of the inspection process prior to dispatch.

- General illumination lights
- Headlights Indicator lamps
- Warning lamps
- HVAC
- Upholstery condition
- Seat frames
- Windshield wipers
- Emergency lights
- Safety appliances
- Wheelchair lift/ramp function
- Wheelchair securing devices

Under no circumstance shall a vehicle be dispatched for shuttle service and/or Extra service with any amenity or safety defect.

[B] Air Conditioner Standards

All shuttles shall have working cooling systems which shall be available during all times the shuttle is in service. Cooling systems shall be capable of maintaining the interior temperature of the shuttle at 77 degrees Fahrenheit. With passengers on-board, regardless of the outside temperature, the interior temperature of the shuttle must be no greater than 80 degrees Fahrenheit within sixty (60) seconds of closing the shuttle doors.

[C] Cleaning

All shuttles shall have had a minimum of a daily cleaning when made available to the Carmel Partners Inc. for service.

#### *4.6 Service Modifications:*

Carmel Partners Inc. may change the scheduled service at its discretion. When making such changes Carmel Partners Inc. will, at a minimum, provide seven (7) days written notice for permanent schedule changes and two (2) days written notice for temporary changes.

#### *4.7 Customer Service:*

Vehicle operators shall be familiar with their shuttle route and shall answer passenger questions in a courteous and informative manner.

#### *4.8 Damage to Property:*

CONTRACTOR shall take care to not damage Carmel Partners Inc. employees' property (e.g. vehicles, bicycles) while performing transportation services. CONTRACTOR shall be responsible for all damage to the Carmel Partners Inc. employees' property caused by actions or inactions of the CONTRACTOR.

#### *4.9 Communication:*

CONTRACTOR shall provide a communications system that will allow for the timely and efficient dispatching, coordination and response necessary to operate services stated herein. At a minimum, the communications system must allow immediate communication between the dispatcher and vehicle operator at all times.

### **5. Cost and Fees**

Quotations shall be for regular scheduled hours only. Non-service hours (travel time) shall not be an expense of the Carmel Partners Inc. Estimated costs to the company shall be broken down into hourly rates.

Hourly rates for additional, extra and emergency services shall be provided as a separate item.

### **6. Payment Schedule**

Upon execution of a contract, the fees for the scope of work will be paid monthly by the 15th upon submitting an accurate invoice of expenses and hours to Carmel Partners Inc.

### **7. Evaluation and Selection Process**

The proposal will be evaluated on the following criteria. Also, the order in which they appear is not intended to indicate their relative importance:

- Project understanding
- Compliance with all RFP requirements
- Offering scope, complexity, and magnitude of safety services
- Type of Vehicle
- Pricing

The management board may require additional information and proposers must agree to provide such information. The management board may also contact and evaluate the bidder's references, contact any bidder to clarify any response if necessary, contact any current users of a bidder's services, solicit information from any available source concerning any aspect of a proposal, and seek and review any other information deemed pertinent to the evaluation process. The management board reserves the right, at its sole discretion, to award the contract to that proposer who will rightly meet the proposal requirements.

In case of any clarifications required of any portions of the proposal, the individual designated from your firm will be directly responsible for carrying out the contract if awarded, and should be present at the oral interview. An award certificate will be mailed to the vendor selected. Receiving the award is contingent upon the successful negotiation of final contract terms.

## **8. Terms of Agreement**

The terms of the agreement shall be for a one-year contract upon the mutual agreement between the CONTRACTOR and the Carmel Partners Board of Directors.

## **9. RFP Submission Requirements**

Interested transportation CONTRACTORS should submit a proposal with relevant details. Proposals should contain the following section of contents and adhere to the following guidelines:

All proposals and accompanying documents should be typed using 12-point font size. Proposals must be clear and provide concise details. The use of technical terms or abbreviations should be limited and when used must be accompanied by a glossary of terms. Proposals should be accompanied by copies of any relevant certifications. Proposals must clearly describe the details of the offer and must conform to the RFP instructions.

Proposals with fictitious commitments, indicating lack of technical or operational expertise may be rejected. Proposals must meet the RFP schedule and should include the following sections. No exceptions will be made.

### **[A] Cover Letter (maximum 3 pages)**

The cover letter must summarize the key elements of proposal and clearly list all the included documents. It must be on the firm's official letterhead and must be signed by a company official authorized to bind contractual agreements. It should indicate a price validity of minimum 90 days.

### **[B] Background and Project Summary (maximum 7 pages)**

This section should be used to exhibit your firm's background in executing this type of project. In this section, provide your firm's level of familiarity with the routes, traffic rules, city regulations and parking zones. Refer to the Scope of Work section of this RFP for more details.

### **[C] Execution/Implementation Summary (maximum 10 pages)**



This section should be used to describe your management and administration's ability to successfully implement the Scope of Work of this RFP. It must include the following details:

- An implementation plan describing the processes followed and the controls in place to ensure a smooth execution of the project. Discuss here the project management strategies and quality control measures your firm will employ to ensure the successful execution of the Scope of Work of this RFP.
- Discuss the details about the strategies and efforts employed in achieving the desired customer satisfaction.
- Our management's goal is to achieve employee satisfaction by providing a safe and comfortable ride so that employees can either continue to work or rest in the shuttle if they choose to do so. Describe here how your firm can contribute in designing such a program.
- Our management has not made any determination on the vehicle type to be used for this program. Such a determination will be made via this RFP process. If your company has multiple fleet options which can serve the requirements of this RFP, then please feel encouraged to submit the proposal with multiple fleet options along with the respective pricing. Please describe the details about the vehicles including make, model, year, type, color, seating capacity. Please accompany the details with clear photos not exceeding the size of postcards. Preference will be given to fleets with renewable fueling source.
- Details about the service-level agreement, if any.
- Details about any permit requirements so as to operate on the aforesaid route including any parking considerations at public areas.
- Details about where the vehicle will be parked while not in use.
- Details about the methods used by the route operator and the dispatch office to ensure continuity of the rides in case of emergency scenarios such as breakdown, medical emergency, etc. Methods used by your company to track the vehicle enroute.
- Describe in detail specific tasks you would require of Carmel Partners Inc. or any other third party to successfully implement this program as specified in the Scope of Work.

[D] Staffing and resourcing (maximum 7 pages)

Please provide details about all the drivers who will be deployed, including copies of licenses and any additional certifications which are required to operate this route.

Please provide details about the company license and relevant operating certificates. Please provide the same for any third-party subcontractors who will operate on behalf of the contracting firm.

[E] Contractor qualifications (maximum 5 pages)

This section demonstrates the firm's ability and expertise in executing similar projects. In this section describe the firm's previous experience from the past 3 years in executing projects similar to the scope of this RFP.

- A summary of the firm's ability to demonstrate continued competence in performing services inside the San Francisco city limits.
- Business references (at least 2) who have received services from your firm in the past. We reserve the right to contact any of the persons or organizations listed here. Please provide details below:

Client Name:

Project Description:  
Project start and end dates:  
Client project manager name, telephone number, email:

[F] Pricing Proposal (maximum 10 pages)

This section must provide details on the pricing model, promotional offers, or discounts offered. The pricing model should meet the following requirements:

- The quote must break down the price of each vehicle per hour. The rate shall include all associated costs including, but not limited to, labor, supervision, insurance, shuttle, fuel, and any other necessary costs.
- Full project pricing for a total 12-month duration of the program including anticipated operating hours details from September 1, 2018 to August 31, 2019.

## **10. Instructions for Submittal of Proposal**

Proposals must conform to all requirements stated within this RFP. Disregarding these measures may result in disqualification of the proposal.

### *10.1 Format of Proposal*

All proposals must be submitted in PDF file format. Proposals must be typewritten in 12-point font, in English on standard paper size (8 ½ x 11 inches).

### *10.2 Preparation of Proposal*

Proposal shall be prepared in a simplistic manner employing economic means with no elaborate supporting material beyond what is sufficient to provide a clear and accurate presentation.

### *10.3 Number of Proposals*

Firms are to submit five (5) bound copies of proposals in sufficient detail so that a comprehensive and comparative analysis can be achieved.

### *10.4 Submission of Proposals*

Completed proposals must be submitted no later than 3:30 p.m. (P.S.T.) on July 21, 2018. Faxed, e-mailed or drop-off proposals will not be accepted. Proposals must be mailed to the stated address:

Carmel Partners Incorporated  
Purchasing and Contracts Administration  
1000 Sansome Street  
San Francisco, CA 94111

**RE: NO 132863, For Provision of Shuttle Bus Service**

### *10.5 Inquiries*

Questions regarding this RFP must be submitted in writing via email to:  
Janet Hawks, VP of Finance, [jhawks@carmelpartners.com](mailto:jhawks@carmelpartners.com)

### *10.6 Withdrawal of Proposals*

A firm may withdraw its proposal any time before July 21, 2018 by delivering a written request for withdrawal signed by the bidder.

### *10.7 The Firm's Proposals Must Only be Submitted in the Stated Order*

#### [A] Cover letter

All proposals must include a cover letter on the firm's letterhead with the signature and title of the person who is authorized to enter a contract with Carmel Partners. The Cover must include the RFP for this project and express a summary of interest for this project.

#### [B] Proposal Forms

The proposal forms must be completed and signed by a person authorized to enter a contract with Carmel Partners.

#### [C] Response to Scope of Work

Response must be clear, simplistic, and well-defined.

#### [D] Cost Proposal

A detailed explanation of the cost must be provided to determine if the fee is reasonable in relation to the services provided. The fee should signify that the firm understands the RFP and provides staff with the option to negotiate cost. The attached Price Proposal Form must be completed and signed by the person in the firm authorized to enter a contract with Carmel Partners. Include any cost information in addition to a not exceed amount.

## **11. INSURANCE REQUIREMENT:**

CONTRACTORS to Carmel Partners, at their own expense, shall for the term of the contract procure and maintain insurance in the coverage amounts specified below. Insurance must be secured by companies licensed to conduct business in the State of California and possess a current Best Key Rating of B++6 or higher. Award is contingent on compliance with Carmel Partners insurance requirements.

Carmel Partners reserves the right to request and to receive certified copies of all specified insurance policies within seven business days. The received policies shall not indicate acknowledgment of deficiencies and an acknowledgment of review or be considered a waiver of Carmel Partners right to require enforcement of the CONTRACTOR'S obligations under the stated agreement.

Carmel Partners is to be named as an additional insured on insurance policies, except for Workers' Compensation Insurance.

[A] Workers' Compensation Coverage

The CONTRACTOR shall carry Workers' Compensation Insurance and Employer's Liability Insurance for its employees to cover obligations imposed by Federal and State of California law. If any work is subcontracted, the CONTRACTOR shall require every subcontractor to carry similar Workers' Compensation Insurance and Employer's Liability Insurance imposed by Federal and California State status. A written notice is required for change in coverage or of coverage cancellation at least thirty days prior to such change.

[B] General Liability Coverage

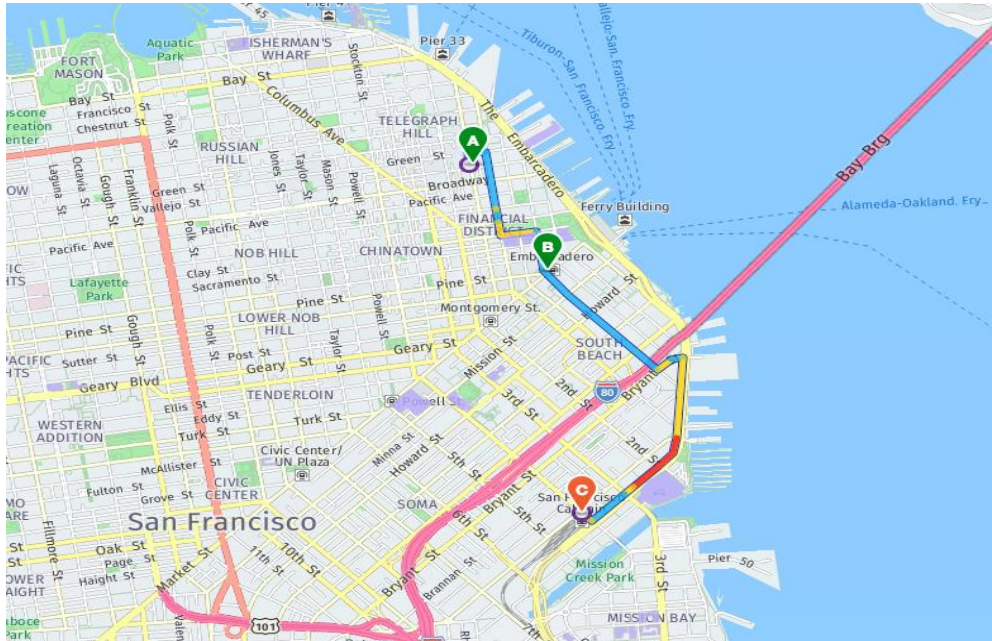
The CONTRACTOR shall maintain Commercial General Liability insurance with a limit of not less than \$1,000,000 for each occurrence with a \$1,000,000 Products and Completed Operations Aggregate and \$1,000,000 General Aggregate Limit. If a Commercial General Liability Insurance form is used either the General Aggregate Limit shall apply separately to the project in accordance with the stated agreement or the General Aggregate Limit shall be at least twice the required occurrence. General Liability Insurance shall cover bodily injury, personal injury and property damage.

[C] Automobile Liability Coverage

The CONTRACTOR shall carry and require subcontractors to carry Commercial/Business Automotive Liability insurance with a combined single limit covering bodily injury and property damage of no less than \$5,000,000 for each occurrence for duties performed under the terms of this agreement. Coverage is to apply to automobiles that are owned, hired, and rented. If CONTRACTOR or their employees use personal automobiles during this project the CONTRACTOR must obtain and verify evidence of personal auto liability coverage for each person.

**Exhibit A.**

**Sample Map Route:**



**Exhibit B.**

**Sample Route Schedule:**

<b>Northbound</b>			
Destination	(C)	(B)	(A)
Pick up location	4th & King St.	Drumm St. & California St.	1000 Sansome St.
Arrival	8:30 AM	9:00 AM	9:25 AM
Departure	8:45 AM	9:15 AM	
<b>Southbound</b>			
Destination	(A)	(B)	(C)
Drop-off location	1000 Sansome St.	Drumm St. & California St.	4th & King St.
Arrival	5:30 PM	5:55 PM	6:15 PM
Departure	5:45 PM	6:00 PM	