

Pre-Proposal Meeting for CATS Transit Management Services

RFP 269-2023-1363

Tuesday, May 16, 2023
2:00pm (ET)

Today's Agenda

1. Pre-Proposal Meeting Agenda
2. Project Overview
3. Preparation of Proposals
4. Evaluation Criteria & Process
5. Procurement Timeline

1. Pre-Proposal Meeting Agenda

- Ask questions during the presentation.
- Pre-Proposal meeting discussions will not alter Project scope or process.
- Project Addenda will be the only source that will amend the existing Scope of Work or contract requirements.
- Any addendas will be posted on City of Charlotte Opportunities page

[Transit Management Services - City of Charlotte \(charlottenc.gov\)](http://charlottenc.gov)

- Pre-Proposal Meeting is to provide transparency to the proposal content, criteria and selection process.

2. Project Overview

The Charlotte Area Transit System (CATS), a department of the City, is seeking a partner to operate and maintain its Bus Operations and Maintenance Services.

- The selected Service Provider will be expected to provide all personnel necessary to perform the required services. The ideal partner will be service-oriented and aggressively focused on ensuring the best possible experience for CATS' customers through collaboration, cooperation, and data-driven continuous improvement processes.

2. Project Overview (cont.)

The Contractor shall be responsible for preparations to begin management of services and personnel. The Contractor will be required to submit a detailed Start-Up Plan prior to the execution of a contract. An outline of the Start-Up Plan must be submitted as part of the proposal.

Contractor shall , own, and operate a subsidiary corporation, to employ personnel subject to any existing Collective Bargaining Agreement. Such subsidiary corporation shall continue with uninterrupted operations regardless of any change in Contractor at either an expiration of the agreement or an earlier termination of the agreement.

2. Project Overview (cont.)

The Contractor shall coordinate, manage, and control all necessary service activities, which shall include, but not be limited to:

- A) Operating all services to the standards required as described throughout this RFP and any service added to this contract by CATS;
- B) Managing drivers and maintenance employees, supervisory, and administrative personnel;
- C) Negotiating collective bargaining agreements;
- D) Establishing all employment policies relative to Contractor's personnel;
- E) Developing driver training/testing programs in coordination with CATS;

3. Preparation of Proposals

Cover Letter (Sec. 4.1.1)

- The Proposal must include a letter of transmittal attesting to its accuracy, signed by an individual authorized to execute binding legal documents on behalf of the Proposer.
- The cover letter shall provide the name, address, telephone and facsimile numbers of the Company along with the name, title, address, email address, and telephone numbers of the executive that has the authority to contract with the City.
- The cover letter shall succinctly present the Company's understanding of the Project and include a summary of the approach to perform the required Services.

3. Preparation of Proposals

Qualifications of the Firm (Sec. 4.1.2)

- Complete table provided

Qualifications of Proposed Staff (Sec. 4.1.3)

- Complete table provided and Organization Chart

3. Preparation of Proposals

Approach to Service Provision (Sec. 4.1.4)

- Describe how your proposed solution will meet or exceed the City's goals for efficient, effective, and collaborative transit management.

3. Preparation of Proposals

Exceptions to the RFP (Sec. 4.1.5)

- Using the table provided, Proposing Companies are required to submit exceptions to the RFP requirements and the sample contract.
- If exceptions are not identified in the submitted Proposal, they may not be considered during Contract negotiation and could result in Proposal being rejected from further consideration.

3. Preparation of Proposals

Required Forms (Sec. 4.1.6)

To be considered responsive to this RFP, Proposing Companies must complete the Proposal Forms listed below.

- Required Form 2. Addenda Receipt Confirmation
- Required Form 3. Proposal Submission Form
- Required Form 4. Proposed Pricing Worksheet
- Required Form 5. References
- Required Form 6. M/W/SBE Utilization
- Required Form 8. Certification Regarding Debarment, Suspension, and Other Responsibility Matters
- Required Form 9. Byrd Anti-Lobbying Certification
- Required Form 10. Financial Capacity Certification and Guaranty

3. Preparation of Proposals

- Proposal package:
 - One original proposal
 - Complete proposal on flash drive in searchable MS-Word or PDF format.

4. Evaluation Criteria & Process

Proposals will consist of a technical proposal and a cost proposal and will be evaluated using the following criteria, listed in descending order of importance:

- Qualifications of Proposed Firm;
- Qualifications of the Proposing Staff;
- Approach to Service Provision
- Cost Effectiveness and Best Overall Value
- Contractor's Financial Viability (Pass/Fail)

4. Evaluations Criteria & Process

- 7-member Evaluation Committee drawn from CATS staff
- During solicitation process, communicate with Procurement Officer only, contact with any other CATS staff is grounds for disqualification.
- CATS may advise Contractors of deficiencies in their proposal and request revised proposals and/or Best and Final Offers (BAFOs).
- CATS may request oral presentations/interviews with all Contractors or reduced range of highest ranked Contractors only.
- Select the proposal that best meets the evaluation criteria and is in the best interest of CATS. Final selection is made on a “best value” basis.

5. Procurement Timeline

(Dates Subject to Change)

- Request for Proposal Advertisement April 18
- Deadline to Submit Questions May 19
- Vendor Questions answered May 26
- Deadline to Submit Proposals June 20
- Preliminary Evaluation of Proposals June - July
- Presentations/Interviews July 17-21
- Selection of Preferred Candidate Late July
- Council Action August

Please submit all questions in writing to:

Todd Holcomb. Transit Procurement
Officer

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