

Request for Proposal

Dynamic Ridematching Application and Services For San Mateo County Commuters

Release Date: May 17, 2017

Proposal Due Date: May 31, 2017

City/County Association of Governments of San Mateo County (C/CAG)
555 County Center, 5th Floor
Redwood City, California 94063

**Request for Proposal
Dynamic Ridematching Application and Services
for San Mateo County Commuters**

The City/County Association of Governments (C/CAG) of San Mateo County, a Joint Powers Agency composed of the County of San Mateo and all twenty cities within the County, invites your company to submit a proposal to provide a dynamic ridematching/carpool matching application (App) and services for San Mateo County commuters as part of the C/CAG Countywide Carpooling Incentives Program.

Proposals must be received NO LATER THAN 4:00 P.M., Wednesday, May 31, 2017. Late proposals shall be rejected. The deadline is absolute and proposals received after the due date and time shall not be considered. One (1) electronic Microsoft Word and PDF version may be submitted by the following methods: E-mail to jhoang@smcgov.org; utilize electronic file sharing services; or deliver a CD or USB Flash Drive to the C/CAG office addressed below:

City/County Association of Governments (C/CAG)
555 County Center, 5th Floor
Redwood City, CA 94063
Attention: John Hoang
E-mail: jhoang@smcgov.org
Phone: 650-363-4105

Note regarding the Public Records Act:

Government Code Sections 6250 *et seq.*, the California Public Records Act, defines a public record as any writing containing information relating to the conduct of the public business. The Public Records Act provides that public records shall be disclosed upon written request and that any citizen has a right to inspect any public record unless the document is exempted from disclosure.

Be advised that any contract that eventually arises from this Request For Proposals is a public record in its entirety. Also, all information submitted in response to this Request For Proposals is itself a public record **without exception**. Submission of any materials in response to this Request For Proposals constitutes a waiver by the submitting party of any claim that the information is protected from disclosure. By submitting materials, (1) you are consenting to release of such materials by C/CAG if requested under the Public Records Act without further notice to you and (2) you agree to indemnify and hold harmless the County for release of such information.

SUBMITTAL REQUIREMENTS

Each submittal must include the information listed below. This information should be confined to no more than 10 pages excluding resumes of staff members and references.

Each submittal should include the following information:

1. Transmittal Letter

The Proposal shall be transmitted with a cover letter describing the respondent's interest and commitment to the proposed project. The cover letter should include the name, title, address and telephone number of the individual to whom correspondence and other contacts should be directed during the selection process.

2. Executive Summary

Provide a summary of the proposal and benefits of selecting company to perform requested services.

3. Project Understanding of Scope of Work/Approach

The proposal shall demonstrate an understanding of the project objectives and the approach taken to implement all of the major elements of the scope of work. The approach shall include potential strategies and considerations specific to the project.

Include any additional task(s) that may add value to the project. Identify items considered to be high-risk and any proposed measures to mitigate these risks. Identify key assumptions for clarification. The proposal shall include detailed scope of work document based on contents of this RFP.

4. Ridematching/Carpool Matching App and Developer Description

Please provide the following information about the App and its developer:

- Purpose and general functionality,
- Target customer market,
- Existing service areas and launch dates by service area,
- Number of registered users and number of rides given/received in the last year or month (per data availability),
- Website address,
- Availability in app stores,
- Privacy policy,
- Rider fees and driver financial benefits,
- The long-term plan for company financial stability,
- Company (or person/group) that developed, operates and maintains the App
- Company/developer location,
- Staffing to support the App,
- Years in business,
- Website address, if different than that of the App,
- Other projects or products, and
- Additional information you wish to provide

Companies are welcome to provide a video demonstration of the product or product marketing materials to supplement the description.

5. Marketing and Promotional Strategies

Describe how the company has, or plans to; promote its App for how to leverage a partnership with C/CAG to encourage the use of the App to form and sustain carpooling behavior.

6. Schedule

Provide a project schedule, including at a minimum, those tasks outlined in the proposed scope of work. The schedule should also include milestones and proposed meetings/deliverables.

7. Experience

Identify any past experience and history the company has had performing this type of work. Provide detailed information on projects with similar work. These reference projects should be of comparable size, scope and magnitude where the above proposed approach/methodology was successfully implemented within the past 5 years. The proposal should also provide lessons learned based on experience with similar projects.

8. Company Profile

Provide a company profile describing company history, number of years the organization has been in business and capabilities. The company profile information should be detailed and complete, and include the following information:

- Name of company, mailing address, phone number, and fax number of the company's principal place of business. Background of the company including a brief company history, other names the company has utilized in the past, companies that have merged or affiliated with the company.
- Mailing address, phone and fax number of the office in which the company's team will work.
- Mailing address, staffing and degree of participation in project by any other company.

9. Qualifications

Identify the qualifications of staff assigned to perform the work. Brief resumes of key staff should be included. The proposal shall designate a Project Leader who will provide a single point of contact for the management and coordination of all aspects of the work. The Project Leader shall be responsible for coordinating and tracking all deliverables, communication with the Project Manager, and reporting of results and recommendations. Identify the task leads and backup individuals. All staff shall be clearly identified with their roles defined as well as their proposed work location during the project. Estimate the percent of onsite time expected by key staff. Staff on the company's team shall be licensed for all applicable professional discipline(s) requiring license.

10. Deliverables

Identify documents to be provided under this project. Identify products to be used in performing tasks. Provide supporting documentation or examples of past work that demonstrate potential deliverables will meet or exceed requirements described in this RFP.

11. References

Provide a list of relevant projects (minimum 2) completed within the last three (3) years, including project description, client (with contact information), location, service provided, value of service, and key personnel.

One (1) electronic version of the proposal document shall be submitted via one of the methods stated above. The company must select a method of delivery that ensures the proposal will be delivered to the correct location by the due date and time. The proposal shall include signed cover letter signed by an authorized representative of the company committing to provide the services within the proposed Request for Proposal (RFP) and stating it is applicable to this project. Failure to furnish this original proposal document shall result in disqualification of the proposal.

Proposals or unsolicited amendments to Proposals arriving after the proposal due date will be rejected as not meeting the mandatory requirements of this RFP. To withdraw a proposal, a company must submit a written request to C/CAG. After withdrawing a previously submitted proposal, a company may submit another proposal at any time up to the deadline for submitting proposals. C/CAG shall not accept any amendments, revisions, or alterations to proposals after the deadline for proposal submittal.

C/CAG is not liable for any costs incurred by a company before entering into a formal contract. Costs of developing the proposal or any other such expenses incurred by a company in responding to the RFP, are entirely the responsibility of the company, and shall not be reimbursed in any manner by C/CAG.

EVALUATION CRITERIA / SELECTION PROCESS

An initial assessment will be made to ensure that a proposal is compliant with the RFP requirements and contains the required forms and information. An incomplete proposal will be disqualified at the option of C/CAG. The Selection Panel will then assess the technical quality of each proposal based on the technical evaluation criteria below. The selection panel will rank the proposals and determine the top technically ranked proposal. If requested by the selection panel, C/CAG will either conduct formal interviews or request additional information. C/CAG reserves the right to not conduct interviews provided the selection panel has adequate information to rank the proposals. If a proposal includes an offer of services in addition to those required by and described in this RFP, these additional services will be considered and could be added to the contract at the sole discretion of C/CAG.

Proposals will be evaluated using the criteria listed below:

- Project understanding
- Quality and completeness of proposal submittal
- Likelihood of the App meeting the needs and objectives of the project in terms of functionality, usability, user-friendliness, features, security, payment mechanisms, customer service/troubleshooting assistance, communication to public about features, etc.
- Ability of the company to facilitate C/CAG's financial contribution during the pilot in a convenient manner
- Likelihood of the funding model in the proposal to incentivize participation; promote a balance of riders and drivers, including sufficiently incentivizing driver participation; and make appropriate use of C/CAG's contribution for the duration of the pilot period
- Ability to provide usable data reports for invoicing and reporting, including but not limited to: number of trips, location of trips by parameters such as zip code and worksite, trip length/vehicle miles traveled, vehicle occupancy, and rideshare attempts/completed
- Likelihood of proposal/approach to achieve project purpose

Subsequent to selection of a proposal, C/CAG will finalize the scope of work and draw up a contract reflecting the terms and conditions of the proposal plus the standard liability, insurance requirements and contingencies. C/CAG reserves the right to negotiate any terms of the contract with the selected company.

C/CAG reserves the right to reject all proposals, and not enter into any contract. Specifically, C/CAG reserves the right to terminate this procurement at any time if it determines this will be in the best interests of C/CAG.

TENTATIVE SCHEDULE FOR THE REVIEW PROCESS

<u>Date</u>	<u>Description</u>
May 17, 2017	Release Request for Proposals
May 31, 2017	Request for Proposals Due
June 1 – June 2, 2017	Selection Panel review proposals
June 5 – June 9, 2017	Company interviews may be held (if necessary). Company selected for interview must be available during this period.
July 8, 2017	Recommendations by the Selection Panel will be presented to the C/CAG Board for approval.

ATTACHMENT A

SCOPE OF WORK

Overview

The City/County Association of Governments of San Mateo County (C/CAG), the Congestion Management Agency (CMA) for San Mateo County, is initiating the C/CAG Countywide Carpooling Incentives Program pilot project. The purpose of the project is to encourage residents and employees of San Mateo County to consider carpooling and ridesharing as a sustainable alternative to driving alone when commuting to and from work. Increased usage of carpools and rideshares during peak commute periods reduce single occupancy vehicle travels and results in fewer trips into and out of San Mateo County. Combined with other transportation demand management strategies, the proliferation and sustained utilization of carpools and rideshares contribute towards the decrease of traffic congestion resulting in increased travel time reliability and reduction in GHG emissions within the county.

C/CAG seeks to utilize emerging technology by partnering with a private sector company that has developed and specializes in a dynamic carpooling and ridesharing mobile application (App) for real-time ride-matching services for the purpose of supporting C/CAG's Countywide Carpooling Incentives Program. C/CAG plans to provide subsidies to commuters to offset actual cost the commuter incurs for each trip taken utilizing the App, therefore, the service must be able to facilitate C/CAG's financial contributions during the pilot project.

Timeframe

The project will commence in July 2017 and continue through June 30, 2018 or until funding is exhausted.

App Requirements

- The App must be an existing, operational, mobile ridematching service available in the San Francisco Bay Area.
- The App must be downloadable from the Apple Store and Google Play and be fully compatible with Apple OS and Android.
- The App must be free to download for individuals.
- The App must facilitate the following:
 - Ridematching on a per trip basis for commuting trips to and from San Mateo County
 - GPS (global positioning system) enabled location tracking to facilitate rider pickup, based on flexible pickup location options
 - Rider/driver contact and ongoing communication as needed
 - Automated payment, travel directions, pickup/drop off locations, rider/driver arrival timing and location information
 - Customer service and troubleshooting assistance for users
- It is desired that the App facilitate the following:

- A mechanism for C/CAG to financially contribute to the trip cost, directly built in to the App
- The ability of the App to display C/CAG's logo
- The ability for the C/CAG contribution to be layered with employer/property manager contributions
- Existing clear, comprehensive communication to the public on features of the tool and how it works, via website and other means as appropriate
- The company must ensure the security of personally identifiable information in accordance with all laws and regulations (C/CAG will not have access to payment information or personally identifiable information stored within the App).

C/CAG is open to multiple approaches toward fulfilling the project's objectives and requirements as stated in this RFP solicitation but reserve the right to select one qualified company to provide the services stated.

Service and Project Requirements

- Motor Vehicle History (MVH) Checks

The safety of San Mateo County commuters is important and essential to the program as a whole; therefore, the service shall perform MVH checks on all potential drivers.

- Facilitate Guaranteed Ride Home Program

The service must include a Guaranteed Ride Home (GRH) program to ensure that all eligible commuters are covered for a GRH. If commuter takes a morning ride with the service, the commuter must be provided a guaranteed ride home if the service cannot match the commuter into an afternoon carpool.

- Detailed Reporting

The service shall provide detailed reporting on a bi-weekly or monthly basis to including at minimum: number of registered users, average vehicle occupancy, number of completed trips, number of monthly active users, CO2 emissions savings, VMT reduction, driver trips reduced (i.e. cars off the road), and reporting on trips by origin/destination zip-codes.

- Dedicated Account Team

Service provider to make available an account team dedicated to C/CAG. This account team will be responsible for scalable marketing, run bi-weekly / monthly check-ins, customer support and regular reporting.

- Minimum Marketing Commitments

Marketing of the C/CAG Countywide Carpooling Incentives Program and App is essential to the success of the project. Service provider will propose a marketing plan and include suggestions on how to jointly promote the C/CAG Countywide Carpooling Incentives Program.

- Integration with RideAmigos

Service must commit to an API integration with RideAmigos for the Commute.org commuter challenge platform. API integration must be complete within (6) months of contract execution.

- Standard Customer Support

Service must provide customer support during commute hours in the form of email, SMS, and phone. Customer support must be available for both drivers and riders on the platform.

Preferred Attributes

- Existing Presence in San Mateo County

Service that already has an existing carpooling program user base within San Mateo County will be advantageous in generating critical mass.

- AppStore ratings in the iOS and Google Play Store

Service that receives positive users rating of at least 4 stars or above is desirable since the key to a successful program include user satisfaction with the App and positive ratings.

Company Responsibilities

The selected company will provide an existing, proven App for on demand carpool ridematching, GPS enabled location tracking, and automated payment; a cost distribution mechanism that includes attributing to the trip cost C/CAG's financial contribution and, potentially, interested employers and property managers; customer assistance and troubleshooting for users; and reporting of data and metrics to C/CAG to support C/CAG payments and grant reporting, such as number of trips and their location, trip lengths/vehicle miles traveled, vehicle occupancy, and ridematches attempted/completed.

The selected company will participate with C/CAG in marketing/promotion activities to increase uptake of the tool.

It will be the company's responsibility to have one or more representatives available who can work collaboratively with C/CAG and respond promptly to C/CAG communications.

C/CAG's Responsibility

C/CAG will provide subsidies toward rides that qualify/meet program criteria up to the available budget amount. C/CAG will participate in marketing activities to promote use of the App and coordinate with participating jurisdictions to also market and promote the App. C/CAG will promote the App through outreach and press releases at various times during the project.

Requirements for Structure and Pricing

As part of the collaboration between C/CAG and the selected company (App), the purpose of the service to be provided is to combine two or more trips that otherwise would have happened separately into a single carpool trip, not to provide a driving service for riders. Thus the service

structure must enable ridematching/carpool matching only for two or more persons whose destinations are the same or similar, or for which one destination is along the way of the other person's destination.

The pricing model should strive to incentivize a sufficient balance of riders and drivers participating in the program, based on prices for riders and contributions to driving costs for drivers that garner sufficient uptake of riders and provision of drivers. The pricing model must not result in a profit for drivers: Contributions to driver cost must not exceed the IRS per mile reimbursement limit of \$0.535 per mile. The pricing model must entail a discount or credit toward the per trip cost to the rider, not a cash award to the rider.