

**LEE COUNTY BOARD OF COUNTY COMMISSIONERS  
AGENDA ITEM SUMMARY**

**BLUE SHEET NO: 20020142**

**1. REQUESTED MOTION:**

**ACTION REQUESTED:** Award RFP-01-07 ADA PARATRANSIT SERVICES, to the proposer whose proposal was evaluated by the Evaluation Committee as being in the best interest of Lee County, ATC/Vancom Inc., for the following fees: 1a. \$9.75; 1b. \$9.75; 2a. \$4.75; 2b. \$4.75; 3a. \$19.20; 3b. \$24.10; 4a. \$11.45; 4b. \$14.45; 5 Ambulatory \$7.10, Wheelchair \$11.60; 6. Ambulatory \$17.00, Wheelchair \$21.50, for an initial contract period to run through June 30, 2003 with the option to renew for three (3) additional 12 month periods, subject to satisfactory performance, acceptance, and determination that renewal is in the best interest of Lee County.

**WHY ACTION IS NECESSARY:** Pursuant to Administrative Code AC-4-4 Lee County Contract Manual, approved by the Board on September 25, 2001, Committee recommendations and award shall be approved by the Board.

**WHAT ACTION ACCOMPLISHES:** Will provide paratransit services to individuals who, because of physical or cognitive conditions, are unable to access the fixed route bus service under the direction of Lee Transit.

**2. DEPARTMENTAL CATEGORY:** 06 Independent Divisions  
**COMMISSION DISTRICT #:** *C6A*

**3. MEETING DATE:**  
*03-19-2002*

**4. AGENDA**

- CONSENT
- ADMINISTRATIVE
- APPEALS
- PUBLIC
- TIME REQUIRED: \_\_\_\_\_

**5. REQUIREMENT/PURPOSE**

- (Specify) STATUTE \_\_\_\_\_  
ORDINANCE \_\_\_\_\_  
 ADMIN. CODE AC-4-4  
OTHER \_\_\_\_\_

**6. REQUESTOR OF INFORMATION**

- A. COMMISSIONER: \_\_\_\_\_
  - B. DEPARTMENT: \_\_\_\_\_
  - C. DIVISION: Lee Transit
- BY: Steve Myers, Lee Transit Director

**7. BACKGROUND:**

The current annual ADA Paratransit Services contract is up for renewal. The existing provider is ATC Public Transportation. In an effort to solicit new proposals below is a list of events that have taken place to date:

- New proposals were solicited under RFP-01-02 for brokerage firms to coordinate ADA Transportation Services. Advertisement was on May 4, 2001 with a deadline of June 21. One (1) proposal was received and at the direction of the Board, this RFP remained sealed.
- June 26, 2001 Board directed staff to return the sole RFP sealed and re-write the RFP to increase competition. A new RFP was written as brokers who are also providers will not be allowed to provide more than 35% of trips. This RFP, RFP-01-07 was advertised on August 17, 2001, with a deadline date for submittal of September 25, 2001. Three (3) proposals were received and opened.
- On September 25, 2001, Lee Tran received a federal express package from ATC/Intelitran (one of the proposers), with a copy of an unsolicited facsimile of Good Wheels proposal prices from an ex-employee of Good Wheels.
- October 3, 2001, a letter was mailed to each of the proposers, from David Owen, Assistant County Attorney, notifying them that we are terminating the review, and the rejection of all the pricings under RFP-01-07, due to an unfair competitive advantage from one proposer over another. At this time all three (3) proposals were returned to each proposer, with stipulation that they would be notified at a later date for the resubmittal of their proposal with new pricing.
- On October 24, 2001 a letter with a new Proposal Pricing Template was issued to each of the three (3) proposers with a new deadline submittal date of November 8, 2001 by 11:30 a.m.

-CONTINUED ON PAGE 2-

**8. MANAGEMENT RECOMMENDATIONS:**

**9. RECOMMENDED APPROVAL**

DEPARTMENT DIRECTOR	Purchasing/Contracts	Human Resources	County Administration				OTHER	COUNTY ATTORNEY	COUNTY MANAGER
			OA	OM	Risk	GC			
<i>Steve Myers</i> 2/18/02	<i>[Signature]</i> 2/15/02	N/A	<i>[Signature]</i> 2/19/02	<i>[Signature]</i> 2/20/02	<i>[Signature]</i> 2/20	<i>[Signature]</i> 2-19-02	<i>[Signature]</i> 2/19/02	<i>[Signature]</i>	

**10. COMMISSION ACTION:**

- APPROVED
- DENIED
- DEFERRED
- OTHER

**RECEIVED BY COUNTY ADMIN.**  
*2/19 15:00pm*  
**COUNTY ADMIN. FORWARDED TO:**  
*4/21 4:30*

**RECVD. BY CO. ATTY.**  
*2/19/02*  
**CO. ATTY. FORWARDED TO:**  
*2/19/02 N*  
*1:20 PM*

- November 8, 2001, all three firms submitted a proposal with pricing by the established deadline date and time. ATC Public Transportation submitted pricing on 3 alternatives: (1) ATC Continues as Brokerage Firm; (2) ATC Operates 35% and (3) LeeTran Performs Operations; DeCandis submitted pricing on the RFP document only and GoodWheels submitted pricing on the submitted proposal and also submitted pricing as an alternative without the 35% restriction.
- November 14, 2001, the Proposal Evaluation Committee met to review each proposal. It was the consensus of the committee that each of the 3 proposals required further clarifications to their submittal.
- November 15, 2001 Contracts Management faxed each proposer a letter requesting clarification to several questions. The deadline for receipt of the clarifications was November 27, 2001.
- On November 26, 2001, Contracts Management received a fax from GoodWheels notifying Lee County that they are withdrawing their primary proposal, leaving Lee County with just the GoodWheels Alternative proposal for evaluation by the Committee.
- November 28, 2001 the Proposal Evaluation Committee reconvened to review the submittals as well as the clarifications received. At the November 28, 2001, Evaluation Committee meeting, the Committee found and determined that further direction from the Board was required due to the nature of the Proposals submitted in order to continue with the selection process, and to consider the alternative of the County (Lee Tran) participating in the process.
- On December 18, 2001, a blue sheet was taken to the Board requesting additional direction with regards to the project.
- The Board of County Commissioners motion was to return the existing proposal and request the proposers to re-price the proposal to provide a firm price for Broker/Operator with up to 100% of the services. Also, requested Lee Transit to prepare a cost analysis for the Broker/Operator with up to 100% of the service as an alternative to outsourcing this service.
- January 14, 2002, Contracts Management issued New Pricing Templates to all three (3) of the proposers, with a deadline for receipt of all Pricing Templates on January 29, 2002 by 11:30 a.m.
- January 29, 2002, all three (3) proposers submitted new Pricing Templates.
- January 31, 2002, the Proposal Evaluation Committee, which consisted of William Hammond, Deputy County Manager; Steve Myers, Transit Director and Susan Oliver, Human Services, met for evaluation of the three-(3) proposals. Based on the proposals submitted it was the consensus of the committee to recommend award to ATC/Vancom Inc. whose proposal was evaluated as being in the best interest of Lee County.
- January 31, 2002, all three (3) firms were notified in writing of the Proposal Committee's recommendation to award, subject to Board approval the proposal to ATC /Vancom Inc.

Therefore, at this time it is being recommended that the Board approve award RFP-01-07 ADA PARATRANSIT SERVICES, to the proposer whose proposal was evaluated by the Evaluation Committee as being in the best interest of Lee County, ATC/Vancom Inc., for the following fees: 1a. \$9.75; 1b. \$9.75; 2a. \$4.75; 2b. \$4.75; 3a. \$19.20; 3b. \$24.10; 4a. \$11.45; 4b. \$14.45; 5 Ambulatory \$7.10, Wheelchair \$11.60; 6. Ambulatory \$17.00, Wheelchair \$21.50 (as specified in the attached Pricing Template).

The County intends to enter into an initial contract period to run through June 30, 2003 with an option to renew for three (3) additional 12 month periods, subject to satisfactory performance, acceptance, and determination that renewal is in the best interest of Lee County.

Funding will be available in account string: k15440148600.503490.08

- Attachments: 1. Evaluation Sheets – ATC/Vancom Inc.  
2. ATC Pricing Template  
3. Evaluation Sheets – DeCandis  
4. Evaluation Sheets – Goodwheels Inc.  
5. Overall Combined Evaluation Sheet

[Originator/Typist Initials]

LEE COUNTY PROPOSAL EVALUATION SHEET  
FOR  
RFP-01-07  
ADA PARATRANSIT SERVICES

DATE: 1/31/02

PROPOSER: ATC

All responding firms must submit the following required information using the prescribed format.

Provided the most recent Financial Statement, and include a Cash Flow Analysis which will show adequate cash flow to provide service.

Pass Fail

Listed the name of your insurance agent, and all companies who insure you. Attach copies of Insurance Certificates.

Pass Fail

Provide a listing of any Pending Litigation.

Pass Fail

Qualification of the Firm

This section of the proposal should establish the qualifications of the presenter to satisfactorily provide the required work by reason of the strength and stability as a business concern.

Included resumes of key personnel proposed for this project. Key positions for this solicitation shall be considered the Project/Operations Manager.

Pass Fail

Identified subcontractors, if any, by company name, address, contact person, telephone number and project function. Provided the same information for each subcontractors as requested above.

Pass Fail

Related Experience and References of the Firm

This section should establish the ability of the firm to satisfactorily provide the required service by reasons of demonstrated competence, by the nature and relevance of recently completed work; record of current contracts; and supportive client references.

Provided examples of similar services that your firm has completed within the last three years. For each reference cited as related experience, furnish the name, title, address and telephone number of the person(s) at the client organization who is most knowledgeable about the work performed.

Pass Fail

ATC

Listed all Business and/or Operating License(s) issued by Lee County or the State of Florida.

Pass Fail

Provided if company as ever had their Operating and/or Business License(s) terminated or suspended? (If yes, provided a detailed explanation of the circumstances.

Yes No

Service Plan

Provided a detailed work plan and description for providing services as described herein. The firm's response should present highlights demonstrating their technical knowledge and capabilities of providing the service as described. Firm's approach should be clearly defined and should include but not be limited to the following.

- Proposed Facility/Facilities
- Drug Free Work Place Policy
- Start-up Plan
- Operations
- Screening
- Hiring
- Training
- Uniforms

Pass Fail  
 Pass Fail  
 Pass Fail  
 Pass Fail  
 Pass Fail  
 Pass Fail  
 Pass Fail  
 Pass Fail

Safety Plan

- Compliance with Chapter 14-90, Florida Statutes
- Accident reporting, standards, procedures
- Complaint procedures
- Dispatch procedures
- Dispatch and supervisory staff
- Radio communications
- Emergency procedures

Pass Fail  
 Pass Fail  
 Pass Fail  
 Pass Fail  
 Pass Fail  
 Pass Fail  
 Pass Fail

- Operations Plan
- Personnel
- Days/Hours of Operation
- Record keeping system
- Performance monitoring
- Security plan
- Training program

Pass Fail

Provided documentation of past D.B.E. effort and proposed D.B.E. efforts for this contract.

Pass Fail

**LEE COUNTY PROPOSAL EVALUATION SHEET  
FOR  
RFP-01-07  
ADA PARATRANSIT SERVICES**

DATE: 1/31/02

PROPOSER: ATC

<b>Criteria</b> 1=Poor      Maximum Points=Excellent	<b>Points Possible</b>	<b>Points Received</b>
<i>Capability &amp; Experience of the firm in coordinating demand response transportation services, particularly ADA services.</i>	15	15
<i>Capability &amp; experience of key personnel to be assigned to the project in coordinating demand response transportation services, particular ADA services.</i>	20	18
<i>Adequacy of proposed facilities, equipment &amp; vehicles</i>	5	5
<i>Adequacy of financial, managerial, and technical resources to successfully carry out the required services and meet required service standards.</i>	10	7
<i>Adequacy &amp; quality of proposer's staffing, implementation &amp; training plans.</i>	10	8
<i>Quality and reporting capabilities of the firms trip reservation software program</i>	10	10
<i>Adequacy of proposer's response to all other requirements, terms, and conditions of this Request for Proposal.</i>	5	4
<b>Price for Services</b>	25	24
<b>Total</b>	100	91

COMMITTEE MEMBERS SIGNATURE: \_\_\_\_\_

SOLICITATION NO.: RFP-01-07  
RE-PRICED PROPOSAL

ADA PARATRANSIT SERVICES  
FOR LEE COUNTY TRANSIT DIVISION  
OFFICIAL PROPOSAL FORM

Date: January 29, 2002  
Proposer Name: ATC Paratransit

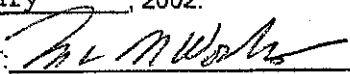
Having carefully examined the "Proposal Documents", all of which are contained herein, the Undersigned proposes to furnish the following which meets these specifications:

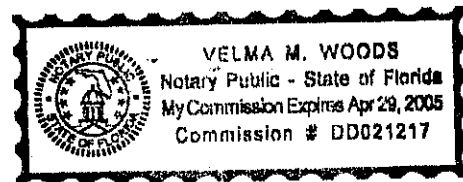
PROVIDE PRICING AS SPECIFIED IN THE RFP

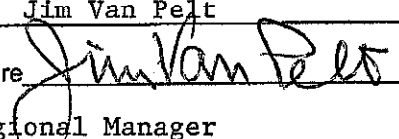
The undersigned acknowledges receipt of the following addenda, and the cost, if any, of such revisions has been included in the price of the proposal.

Addendum # 1 Date: January 23, 2002  
Addendum # \_\_\_\_\_ Date: \_\_\_\_\_  
Addendum # \_\_\_\_\_ Date: \_\_\_\_\_

In witness whereof, the Proposer has hereunto set his signature and affixed his seal this 29th day of January, 2002.

ATTEST:  (Seal)



By: Printed Jim Van Pelt  
By: Signature   
Title: Regional Manager

<u>ATC Paratransit</u>	<u>Joel Hargis</u>
Company Name	Contact Person
<u>4400 PGA Boulevard, Ste. 400</u>	<u>(561) 799-5285</u>
Mailing Address	Phone Number
<u>Palm Beach Gardens, Fl. 33410</u>	<u>(561) 828-0953</u>
City, State, and Zip	Fax Number

Deadline: January 29, 2002 @ 11:30 a.m.  
Dated: January 14, 2002

BROKER/OPERATOR UP TO 100%  
OPTION 2

Firm's Name: ATC Paratransit  
RFP-01-07

### PRICE BID SHEET

- 
- 1a. Cost per Individual ADA Ambulatory Passenger Trip minus  
\$2.00 retained fare = County Cost per trip: \$9.75
- 1b. Cost per Individual ADA Wheelchair Trip minus  
\$2.00 retained fare = County Cost per trip: \$9.75
- 
- 2a. Cost per Multi-Load ADA Ambulatory Passenger Trip minus  
\$2.00 retained fare = County Cost per trip: \$4.75  
\*Multi-Load is defined as three or more passengers picked up  
or dropped off at a common location.
- 2b. Cost per Multi-Load ADA Wheelchair Trip minus  
\$2.00 retained fare = County Cost per trip: \$4.75
- 
- 3a. Cost per Individual ADA Ambulatory Passenger Trip  
provided in a non-county owned vehicle minus  
\$2.00 retained fare = County Cost per trip: \$19.20
- 3b. Cost per Individual ADA Wheelchair Passenger Trip  
provided in a non-county owned vehicle minus  
\$2.00 retained fare = County Cost per trip: \$24.10
- 
- 4a. Cost per Multi-Load ADA Ambulatory Passenger Trip  
provided in a non-county owned vehicle minus  
\$2.00 retained fare = County Cost per trip: \$11.45  
\*Multi-Load is defined as three or more passengers picked up  
or dropped off at a common location.
- 4b. Cost per Multi-Load ADA Wheelchair Passenger Trip  
provided in a non-county owned vehicle minus  
\$2.00 retained fare = County Cost per trip: \$14.45
- 
- 5 Fee paid by the proposer to Lee County for transportation of non-ADA sponsored  
passengers provided by the carriers in county vehicles shall be as follows:  
**Sponsoring agency rate less the applicable ADA rate equals net due to Lee County:**  
**Ambulatory: \$7.10 Wheelchair: \$11.60**
- 
6. Fee paid to Lee County for transportation provided by LeeTran of ADA and non-ADA  
sponsored passengers in Lee county vehicles shall be paid as follows: **Sponsoring  
agency reimbursement rate less the trip coordination fee equals net due to Lee  
County: Ambulatory: \$17.00 Wheelchair: \$21.50**

CTC Lee & DeSoto Counties  
North River Center, Unit 11 & 12  
13240 N. Cleveland Avenue  
N. Fort Meyers, FL 33903  
(941) 656-5530  
Fax (941) 656-6563



Date: January 29, 2002  
Subject: ADA Paratransit Service  
Solicitation Number: RPF-01-07

In response to your request to provide an updated, current list of proposed sub-contractors for the provision of ADA services, the following are our proposed sub-contractors:

1. Goodwheels, Inc.  
10075 Bavaria Road, S.E.  
Ft. Myers, Fla. 33913  
(941) 768-6184  
President: Gary Bryant
  
2. Ambitrans  
P.O. Box 2444  
Port Charlotte, Fla. 33949  
(941) 743-3665  
President: Michael Grant

If further information is required regarding the above proposed sub-contractors, the additional information will be submitted upon request.





LEE COUNTY PROPOSAL EVALUATION SHEET  
FOR  
RFP-01-07  
ADA PARATRANSIT SERVICES

DATE: 1/31/02

PROPOSER: DeCANDIS

**All responding firms must submit the following required information using the prescribed format.**

**Provided the most recent Financial Statement, and include a Cash Flow Analysis which will show adequate cash flow to provide service.**

**Pass**      **Fail**

**Listed the name of your insurance agent, and all companies who insure you. Attach copies of Insurance Certificates.**

**Pass**      **Fail**

**Provide a listing of any Pending Litigation.**

**Pass**      **Fail**

**Qualification of the Firm**

**This section of the proposal should establish the qualifications of the presenter to satisfactorily provide the required work by reason of the strength and stability as a business concern.**

**Included resumes of key personnel proposed for this project. Key positions for this solicitation shall be considered the Project/Operations Manager.**

**Pass**      **Fail**

**Identified subcontractors, if any, by company name, address, contact person, telephone number and project function. Provided the same information for each subcontractors as requested above.**

**Pass**      **Fail**

**Related Experience and References of the Firm**

**This section should establish the ability of the firm to satisfactorily provide the required service by reasons of demonstrated competence, by the nature and relevance of recently completed work; record of current contracts; and supportive client references.**

**Provided examples of similar services that your firm has completed within the last three years. For each reference cited as related experience, furnish the name, title, address and telephone number of the person(s) at the client organization who is most knowledgeable about the work performed.**

**Pass**      **Fail**

Listed all Business and/or Operating License(s) issued by Lee County or the State of Florida.

Pass Fail

Provided if company as ever had their Operating and/or Business License(s) terminated or suspended? (If yes, provided a detailed explanation of the circumstances.

Yes No

Service Plan

Provided a detailed work plan and description for providing services as described herein. The firm's response should present highlights demonstrating their technical knowledge and capabilities of providing the service as described. Firm's approach should be clearly defined and should include but not be limited to the following.

- Proposed Facility/Facilities
- Drug Free Work Place Policy
- Start-up Plan
- Operations
- Screening
- Hiring
- Training
- Uniforms

Pass Fail  
 Pass Fail  
 Pass Fail  
 Pass Fail  
 Pass Fail  
 Pass Fail  
 Pass Fail  
 Pass Fail

- Safety Plan
- Compliance with Chapter 14-90, Florida Statutes
- Accident reporting, standards, procedures
- Complaint procedures
- Dispatch procedures
- Dispatch and supervisory staff
- Radio communications
- Emergency procedures

Pass Fail  
 Pass Fail  
 Pass Fail  
 Pass Fail  
 Pass Fail  
 Pass Fail  
 Pass Fail

- Operations Plan
- Personnel
- Days/Hours of Operation
- Record keeping system
- Performance monitoring
- Security plan
- Training program

Pass Fail

Provided documentation of past D.B.E. effort and proposed D.B.E. efforts for this contract.

Pass Fail

**LEE COUNTY PROPOSAL EVALUATION SHEET  
FOR  
RFP-01-07  
ADA PARATRANSIT SERVICES**

DATE: 1/31/02

PROPOSER: DELANDIS

<b>Criteria</b> 1=Poor      Maximum Points=Excellent	<b>Points Possible</b>	<b>Points Received</b>
<b>Capability &amp; Experience of the firm in coordinating demand response transportation services, particularly ADA services.</b>	15	10
<b>Capability &amp; experience of key personnel to be assigned to the project in coordinating demand response transportation services, particular ADA services.</b>	20	18
<b>Adequacy of proposed facilities, equipment &amp; vehicles</b>	5	3
<b>Adequacy of financial, managerial, and technical resources to successfully carry out the required services and meet required service standards.</b>	10	4
<b>Adequacy &amp; quality of proposer's staffing, implementation &amp; training plans.</b>	10	8
<b>Quality and reporting capabilities of the firms trip reservation software program</b>	10	10
<b>Adequacy of proposer's response to all other requirements, terms, and conditions of this Request for Proposal.</b>	5	3
<b>Price for Services</b>	25	10
<b>Total</b>	100	66

COMMITTEE MEMBERS SIGNATURE: \_\_\_\_\_

LEE COUNTY PROPOSAL EVALUATION SHEET  
FOR  
RFP-01-07  
ADA PARATRANSIT SERVICES

DATE: 1/31/22

PROPOSER: Good Wheels

All responding firms must submit the following required information using the prescribed format.

Provided the most recent Financial Statement, and include a Cash Flow Analysis which will show adequate cash flow to provide service.

Pass Fail

Listed the name of your insurance agent, and all companies who insure you. Attach copies of Insurance Certificates.

Pass Fail

Provide a listing of any Pending Litigation.

Pass Fail

Qualification of the Firm

This section of the proposal should establish the qualifications of the presenter to satisfactorily provide the required work by reason of the strength and stability as a business concern.

Included resumes of key personnel proposed for this project. Key positions for this solicitation shall be considered the Project/Operations Manager.

Pass Fail

Identified subcontractors, if any, by company name, address, contact person, telephone number and project function. Provided the same information for each subcontractors as requested above.

Pass Fail

Related Experience and References of the Firm

This section should establish the ability of the firm to satisfactorily provide the required service by reasons of demonstrated competence, by the nature and relevance of recently completed work; record of current contracts; and supportive client references.

Provided examples of similar services that your firm has completed within the last three years. For each reference cited as related experience, furnish the name, title, address and telephone number of the person(s) at the client organization who is most knowledgeable about the work performed.

Pass Fail

Listed all Business and/or Operating License(s) issued by Lee County or the State of Florida.

Pass Fail

Provided if company as ever had their Operating and/or Business License(s) terminated or suspended? (If yes, provided a detailed explanation of the circumstances.)

Yes No

Service Plan

Provided a detailed work plan and description for providing services as described herein. The firm's response should present highlights demonstrating their technical knowledge and capabilities of providing the service as described. Firm's approach should be clearly defined and should include but not be limited to the following.

- Proposed Facility/Facilities
- Drug Free Work Place Policy
- Start-up Plan
- Operations
- Screening
- Hiring
- Training
- Uniforms

Pass Fail  
 Pass Fail  
 Pass Fail  
 Pass Fail  
 Pass Fail  
 Pass Fail  
 Pass Fail  
 Pass Fail

Safety Plan

- Compliance with Chapter 14-90, Florida Statutes
- Accident reporting, standards, procedures
- Complaint procedures
- Dispatch procedures
- Dispatch and supervisory staff
- Radio communications
- Emergency procedures

Pass Fail  
 Pass Fail  
 Pass Fail  
 Pass Fail  
 Pass Fail  
 Pass Fail  
 Pass Fail

Operations Plan

- Personnel
- Days/Hours of Operation
- Record keeping system
- Performance monitoring
- Security plan
- Training program

Pass Fail

Provided documentation of past D.B.E. effort and proposed D.B.E. efforts for this contract.

Pass Fail

**LEE COUNTY PROPOSAL EVALUATION SHEET  
FOR  
RFP-01-07  
ADA PARATRANSIT SERVICES**

DATE: 1/31/02

PROPOSER: GOOD WHEELS

Criteria 1=Poor      Maximum Points=Excellent	Points Possible	Points Received
Capability & Experience of the firm in coordinating demand response transportation services, particularly ADA services.	15	13
Capability & experience of key personnel to be assigned to the project in coordinating demand response transportation services, particular ADA services.	20	18
Adequacy of proposed facilities, equipment & vehicles	5	5
Adequacy of financial, managerial, and technical resources to successfully carry out the required services and meet required service standards.	10	7
Adequacy & quality of proposer's staffing, implementation & training plans.	10	8
Quality and reporting capabilities of the firms trip reservation software program	10	10
Adequacy of proposer's response to all other requirements, terms, and conditions of this Request for Proposal.	5	4
Price for Services	25	25
<b>Total</b>	<b>100</b>	<b>90</b>

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

COMMITTEE MEMBERS SIGNATURE: \_\_\_\_\_