



SAN ANDREAS REGIONAL CENTER  
300 Orchard City Drive  
Campbell, CA 95008  
(408) 374-9960

TO: All Potential Request for Proposal Respondents

FROM: Jeffery Darling, Resource Manager, San Andreas Regional Center  
Susan Harris, Transportation Resource Specialist, San Andreas Regional Center

DATE: February 1, 2016

RE: RFP for Transportation Company

**San Andreas Regional Center**

**Type of Program:** Transportation Company

**Geographic location(s):** Santa Clara County

**SERVICE DESCRIPTION:** The Contractor shall furnish labor, vehicles, materials, supplies and special equipment as required to provide the transportation services described herein. Contractor shall be required to provide transportation for San Andreas Regional Center (hereafter, "San Andreas") clients attending programs primarily located in, but not limited to, Santa Clara County. San Andreas is seeking proposals for services in portions of Santa Clara County. Service shall be provided on such days and at such times as are specified by San Andreas, to and/or from locations, for such persons as are specified by the San Andreas Transportation Resource Specialist. Service as described herein shall be provided on the weekdays, Monday through Friday between the hours of 6:00 A.M. and 7:30 P.M. There are holidays, defined by San Andreas service Providers including the Transportation Company, when service will not be required.

## **REQUIREMENTS FOR TRANSPORTATION SERVICE DELIVERY TO CLIENTS**

Contractor shall keep confidential all client information except that information necessary for the provision of service. All employees shall be reminded that clients' identifications, addresses and characteristics are confidential. Additional information may be released for the protection of health and/or safety of the client or other persons in the vehicle. Scheduled client ride times for passengers shall be no greater than one and a half (1.5) hours long, one-way. Overall passenger ride times shall average one and a half (1.5) hours or less one-way. The family members or care providers of new riders shall be notified by Contractor of scheduled pick-up and drop-off times, prior to the day on which such new service is to begin. Contractor shall provide daily curb-to-curb delivery of San Andreas clients and assure that an authorized person is present who has accepted responsibility for the delivered person. The family member or care provider at either end of any trip shall have passengers ready to board and be ready to receive each passenger at the delivery destination. Pick up or delivery of a person shall not be more than fifteen minutes earlier than the scheduled time nor fifteen minutes later. The families, care providers, or program staff shall be notified by Contractor when vehicles will be arriving more than fifteen (15) minutes ahead of or behind schedule. Contractor shall attempt to pick up for three (3) consecutive days any person who is absent without prior notification. Contractor will notify weekly San Andreas' Transportation Resource Specialist of passengers absent without notification for more than three consecutive days. The seat belts of any person aboard shall be fastened when the vehicle is in motion or its motor is running. It is the driver's responsibility to ensure that seat belts are fastened after seating the passengers.

## **HEALTH/SAFETY OF PASSENGERS**

It is the responsibility of the Contractor to maintain health and safety on all vehicles serving San Andreas. Contractor shall verbally report any incidents of misconduct to San Andreas Transportation Resource Specialist within twenty-four (24) hours of the incident. Misconduct is generally defined as behavior on the vehicle that compromises the safety or ride quality of the passengers or the driver. However, if the incident involves an injury or accident, the Contractor shall report it on the day of the incident as required by "Reporting Requirements", followed by a written report as required by the same Paragraph. This reporting will follow standard Special Incident Report (SIR) procedures as defined on the San Andreas website at:

<http://www.sanandreasregional.org/special-incident-reporting/>. The Contractor may refuse to transport a person only if the transportation

poses a threat to his/her health or safety or that of the driver, transportation aide or other passenger. The Contractor shall, within one (1) working day following the refusal to transport such persons, notify and discuss the problem with San Andreas. The Contractor shall, within five working days following the refusal to transport, submit a written explanation of the refusal. All such incidents will be investigated by San Andreas and the Contractor and a detailed report prepared specifying any necessary corrective action. The Contractor shall permit San Andreas staff to ride a vehicle at any time for purposes of monitoring, evaluating and/or treating passenger behavior. Contractor shall support the bus driver(s) in implementing procedures for managing behavior on the bus that will maintain the welfare and safety of all passengers, including the driver. Contractor will adhere to limiting the number of clients carried in current vehicles to the design capacity of the vehicles.

### **REQUIREMENT OF RESPONSIBILITY**

All passengers must be released only to the custody of a responsible adult unless Contractor receives authorization in writing that the client may be left unsupervised. In the event a claim, suit or other legal proceeding is filed on account of leaving alone a person unsupervised, the Contractor shall defend and indemnify San Andreas, its agents, employees, officers and directors against such claim, suit or legal proceeding and shall be liable for all costs of defending the same and for the payment of any settlement, judgment or award resulting therefrom. Contractor shall establish procedures for the immediate handling of those cases where there is no responsible adult available to receive a disembarking passenger. These procedures shall be subject to San Andreas review and approval. San Andreas shall assist in working with families and care providers who fail repeatedly to provide responsible and timely adult assistance and escort of persons to and at pick-up and delivery points.

### **ROUTING AND SCHEDULING**

The routes shall be designed by the Contractor in accordance with the schedule information provided by the San Andreas Transportation Resource Specialist. Contractor shall assure that persons will be picked up within a window of 30 minutes (15 minutes either side of the designated pick up time) and delivered to their destinations within 15 minutes of the requested arrival time. Similarly, Contractor shall pick up passengers at the requested place and time and deliver them to the designated drop-off places within a window of 30 minutes (15 minutes either side of the designated drop-off time). Drivers are to wait for passengers for a maximum of five (5) minutes after the scheduled



pickup time before proceeding on route. Routes shall not be accepted by San Andreas which have an average ride time in excess of one and a half (1.5) hours. No passenger shall experience a ride time in excess of one and a half (1.5) hours. The Contractor shall provide a telephone number which parents, care providers or guardians must call prior to 6:00 A.M. to indicate that a client will not be using the bus on that day. The Contractor shall assist San Andreas in maintaining accurate information about routes and provide corrections to the San Andreas transportation database as may be necessary. Transportation Service Providers are required to maintain Internet access including an e-mail address capable of accepting data downloads and for transmitting data to San Andreas. Service Providers are required to collect attendance data on a daily basis for all trips provided. This data must be transmitted monthly to San Andreas within 5 days of the close of the month. During the startup phase of the transportation service, Contractor will be prepared to work closely with the San Andreas Transportation Resource Specialist to develop a system of electronic data transfer with a mutually compatible data program and compatible data conventions. This shall continue throughout the duration of the contract. Upon award of contract, San Andreas shall provide the Contractor with the most up to date information available from the Transportation Service Request Form. An updated list of contact persons at each program site and destination addresses and program hours shall also be provided at this time. Thereafter, San Andreas shall provide updated information on individual Transportation Service Request Forms, as such changes occur. At least ten (10) working days prior to the date that Contractor begins rendering services under the Service Agreement, Contractor shall provide San Andreas with a copy of the routes so established. Thereafter, a copy of the routes showing changes shall be made available to San Andreas upon request. Such changes shall be made on routes from time to time pursuant to the service request process as described below.

### **SERVICE REQUEST PROCESS**

Contractor shall make changes to routes, as requested in writing by the San Andreas Transportation Resource Specialist, in order to:

- Suspend or delete service the next working day following receipt of notification from San Andreas.
- Add a passenger to a route no later than ten days following notification from San Andreas.
- Add a new program location to a route no later than thirty (30) days following notification from San Andreas.
- Delete a program location from a route no later than thirty (30) working days following notification from San Andreas.



Service shall be approved in writing only by San Andreas Transportation Resource Specialist, or other authorized individual. Notification of such changes referred to above may be received only from the Transportation Resource Specialist, or other authorized individual. No payment shall be made for any portion of a monthly invoice submitted in accordance with this Service Description attributable to any service suspended or deleted. No payment shall be made for any rider not authorized to travel by the San Andreas Transportation Resource Specialist as set forth in this Service Description. Increased/decreased service resulting from demographic changes shall be implemented by the Contractor at the agreed rate, since such increase or decrease is deemed to be an ordinary part of Service Description.

### **CONTRACTOR'S PERSONNEL**

The Contractor shall employ, train and retain the required number of drivers, aides, dispatchers and administrative personnel necessary to provide the required levels of service. All personnel assigned to provide services under the contract with San Andreas shall be subject to the continued approval of San Andreas.

### **Drivers/Aides**

Drivers employed by the Contractor to provide service to San Andreas shall have and maintain at minimum a valid California Class B (passenger endorsed) driver's license pursuant to Vehicle Code Section 12500 and a medical certificate pursuant to Vehicle Code Section 12804. All drivers and aides driving under this contract shall be at least 21 years old. Contractor shall not employ under this contract any driver who has been convicted of driving under the influence of alcohol or drugs, or reckless driving, or speed contest within the five years preceding and during this employment. San Andreas requires that all drivers/aides be in good physical and mental health at all times while in service of San Andreas. Contractor shall develop and implement a pre-employment screening program satisfactory to San Andreas which shall include a California Department of Motor Vehicles (DMV) check and such screening information shall be in a permanent driver record held by Contractor. Contractor shall provide San Andreas with evidence of driver pre-employment screening and driver DMV checks when requested by San Andreas. Other required pre-employment checks shall include but are not be limited to, a criminal check with the California State Department of Justice to assure that the prospective driver/aide has not been convicted of any State or Federal offense. All drivers/aides shall be well groomed at all times when driving or riding

in vehicles in service of San Andreas. Contractor provided identification shall be worn. Drivers/aides shall be assigned to the same route whenever possible. Contractor shall review driver/aide performance at least once each year in order to observe their operating practices. This review shall include, but not be limited to, review of safety practices; conformity to all pertinent safety and operating policies, regulations and laws; adherence to established routes and schedules; interpersonal and physical management of passengers; proper wheel chair lift and tie down procedures; sensitivity training; training in understanding disability types; other factors involved in the provision of transportation service for individuals with developmental disabilities (e.g., communications with parents, staff of day programs, maintaining accurate route lists, etc.). All drivers/aides assigned to perform San Andreas services shall maintain a minimum overall rating of "satisfactory". Use of drugs, alcohol, and tobacco while in a vehicle in San Andreas use is prohibited. Firearms, knives, and other weapons are prohibited on said vehicles. Drivers/aides shall not stop during routes for meals or food breaks nor shall they offer or give food to San Andreas passengers. Drivers/aides shall adhere to all Contractor developed policies related to absence and tardiness, attitude and conduct toward persons in their care. San Andreas reserves the right to review said policies, procedures and implementation. San Andreas reserves the right to review all pertinent performance records of drivers/aides providing services to San Andreas.

### **Other Personnel**

Contractor shall maintain staff as required for effective management and supervision of the transportation service provided to San Andreas. This shall include the availability of personnel to receive and place telephone calls, monitor the service during the hours passengers are being transported, and respond to emergencies promptly.

### **USE OF AIDES**

San Andreas shall authorize and pay for the use of aides on a route-by-route basis. No aide hours may be charged to San Andreas without prior written consent from San Andreas Transportation Resource Specialist. The continued use of aides shall be periodically reviewed by San Andreas to determine whether there may be alternatives to such use of aides on given vehicles/routes.

### **DRIVER/AIDE ORIENTATION**

All drivers/aides shall attend driver/aide orientations presented by Contractor which shall include but not be limited to, instruction concerning passenger management on the vehicle; dealing with

parents and care providers; procedures for reporting incidents and accidents; procedures for reporting late service; drivers reporting themselves lost and other related service problems, with emphasis on communicating with head office. Participation in such programs shall be documented and included as part of each driver's personnel record. Said driver/aide orientations shall be of sufficient duration to ensure that the driver/aide is prepared to perform his/her duties safely and efficiently. Evidence shall be maintained of driver orientation prior to a driver's performing service as required under this Service Description. In addition, evidence shall be maintained of completion of training by all aides regarding types of disabilities and potential passenger behavior issues. All costs for driver/aide orientation shall be borne by the Contractor.

### **DRIVER SAFETY PROGRAM**

Contractor shall plan and implement an ongoing safety program in a format satisfactory to San Andreas and shall provide qualified instructors to conduct the program. The cost of the safety program shall be borne by Contractor. The scheduled dates and scheduled content of such safety programs shall be submitted to San Andreas at the request of San Andreas. Said program shall include, but not be limited to, first aid instruction, CPR instruction, and instruction in passenger assistance, two-way communication procedures, and safe driving. It is desirable that drivers/aides required to work with handicapped persons have training in lifting techniques and treatment of wheelchair clients who must be lifted. All such personnel shall be physically capable of performing the required lifting and of operating the equipment provided for this purpose. The Contractor shall assure that each driver/aide has received all training covered by the program, together with regular refresher courses or training in new or improved techniques. Evidence of attendance shall be provided to San Andreas upon request. Drivers/aides shall receive sensitivity training and be trained in passenger assistance techniques for developmentally disabled persons. San Andreas may conduct or may assist the Contractor in conducting such in-service training activities as are deemed appropriate by San Andreas. Evidence of drivers' training programs shall be reflected in the safe operation of vehicles under service to San Andreas. Appropriate San Andreas representatives may monitor standards.

### **CONTRACTOR'S EQUIPMENT**

Before any services are rendered by the Contractor to San Andreas, and at all times during the term of the Agreement with San Andreas, the Contractor shall assure the following:



- Contractor shall supply a sufficient fleet of vehicles to run all routes as regularly scheduled.
- Contractor shall use vehicles with capacities of twenty-five (25) or fewer passengers. San Andreas prefers that all vehicles be lift-equipped in order to accommodate the potential changing needs of the consumers served. Non lift-equipped vehicles may be used for routes with all ambulatory passengers. However, should a passenger's ambulation status change or a non-ambulatory passenger be added to the route, the Contractor will be expected to accommodate the non-ambulatory passenger by providing a lift-equipped vehicle.
- Contractor shall provide and maintain vehicles that meet the requirements of the California Highway Patrol annual terminal inspection (Section 34501 (c), (e), California Vehicle Code).
- Contractor shall routinely provide documentation to San Andreas that vehicles have been inspected annually by the California Highway Patrol, as required, and that any items cited for repair or completion have been satisfactorily addressed. Contractor shall not transport passengers in vehicles that do not meet all federal and state safety standards. At no time during the term of this contract shall the Contractor operate any vehicle that has more than 450,000 miles or is greater than nine (9) model years old. Any vehicle reaching either of these thresholds must be immediately replaced with a vehicle that does not exceed these criteria. However, vehicles may exceed these thresholds upon approval of San Andreas.
- Contractor shall maintain all vehicles in good condition during the term of this Agreement. San Andreas reserves the right to inspect or to ride in, or to have a designated agent inspect or ride in, the vehicles on or off Contractor's premises at any time during the term of this Agreement.
- Contractor shall provide regularly scheduled preventative maintenance for each vehicle assigned to San Andreas transportation service as specified by the vehicle manufacturer and in accordance with State regulations. Documentation of such maintenance on each vehicle shall be made available to San Andreas upon request. All vehicles used by the Contractor shall be kept clean and sanitary and shall have a good exterior and interior appearance during the entire term of the Agreement.
- Contractor shall provide a route identification card, displaying San Andreas route number, to be carried by each vehicle so as to be visible from the outside, while in the service of San Andreas. All vehicles shall have sufficient fuel to complete one A.M. or P.M. route before the boarding of any passenger. No

vehicle shall be stopped for refueling with clients on board. All vehicles shall be equipped with first aid kits, fire extinguishers, and CHP approved hazard warning equipment. All vehicles shall be equipped with 2-way radios or other means of voice communications of such range and power that no vehicle is beyond radio communication with its dispatcher during hours of service. Every vehicle shall have enough seats of such size and type as to accommodate comfortably and safely all passengers on its route. Each vehicle shall have adequate heating and air conditioning for passenger and driver well-being.

### **SPECIAL EQUIPMENT REQUIREMENTS**

If during the period of the executed Service Agreement any modification or installation of equipment is required due to a change in the law or applicable rules and regulations, such modification or installation shall be made by the Contractor as required. Costs of such modification, installation, and maintenance shall be borne by the Contractor. In all vehicles, seat belts and wheelchair tie-downs of sufficient number and quality shall be installed so that all passengers in wheelchairs may be adequately secured during transport and each ambulatory client has access to a correctly installed seat belt.

Wheelchair restraints shall provide the maximum restraint possible and shall be fastened in a manner that does not damage the chair.

Contractor shall provide this equipment, at Contractor's own expense. Shoulder harnesses or other restraining devices that may be requested in writing by San Andreas, due to the nature of a particular person's handicapping condition, San Andreas shall bear the costs of such devices. Wheelchair accessible vehicles shall be provided by Contractor as required to safely transport passengers needing such vehicles, at Contractor's own expense. Wheelchair ramps, their location on the vehicle, mechanically or electrically operated lifts, if used, and wheelchair securement within the vehicles shall be in accordance with applicable State and Federal regulations, and shall be provided by the Contractor, at the Contractor's own expense. Contractor shall not use on any route a vehicle that does not contain all required special equipment. All passenger seats in vehicles operated for San Andreas clients must accommodate adult passengers and not be School bus type seats.

### **CONTRACTOR'S FACILITIES AND LOCATION OF EQUIPMENT**

Contractor shall maintain adequate and secure administrative, maintenance, and parking facilities as central to the area of operation as possible. Vehicles used in service of San Andreas shall be night parked to provide most efficient and secure transportation service.

This may include parking at driver's residences as long as the vehicles are secure. Such plan must be included in the Contractor's proposal if such a method of operation is to be implemented. Contractors should locate operating and maintenance facilities in a location that maximizes the efficiency of the operation. Facilities may be shared with other Contractor operations.

### **SCHEDULED PROGRAM CLOSINGS**

Payment shall be made subject to the reporting required by Section 15 above, and shall be for authorized and verified services. Accordingly, no payments shall be made for any services reported when day programs or other destinations are scheduled to be closed.

### **REPORTING REQUIREMENTS**

Complete route sheets/driver manifests shall be submitted to San Andreas upon request. Route sheets shall include all routes providing service under this agreement, including those of any and all subcontractors. Route sheets shall include:

- Route number, indicating A.M. or P.M.
- Client name;
- Pick-up address;
- Scheduled pick-up time;
- Drop-off address;
- Scheduled drop-off time;
- Wheelchair route noted;
- Aide route noted

Accompanying route sheets, Contractor shall submit to San Andreas upon request a listing of all passengers transported under this Agreement identifying the client name, address, destination, route number(s) and time of pick up or drop off. Vehicle information shall be submitted within five (5) days prior to the start of the contract with the route sheets. Contractor shall complete a vehicle inventory form identifying every vehicle in use under this Agreement, including any vehicles in use by any subcontractors. Vehicle information shall be provided including license number, make, model, size, year, fuel type, mileage and related information on each vehicle. This information will be updated yearly. All accidents/incidents that involve San Andreas's passengers and Contractor's equipment or personnel shall be reported to San Andreas using the Agency's Special Incident Report (SIR) as follows:

- Accidents/incidents involving injuries shall be reported on the same day to the San Andreas
- Transportation Department immediately after the Contractor receives notification of same.



- San Andreas will assist in training regarding this incident reporting procedure to the Contractor.
- A further written report which includes all pertinent information shall be provided by the Contractor as soon as is reasonably possible after each accident/ incident, whether or not an injury is involved, but in no event later than three (3) working days after the accident/incident.
- Contractor shall provide any additional information concerning the accident/incident as may be requested by San Andreas.

### **MONITORING AND INVESTIGATION**

San Andreas reserves the right to monitor the Contractor's performance as described within this Service Description, including but not limited to the following areas:

- San Andreas may monitor ride times to ensure that the system average ride times are within the limits.
- San Andreas may monitor service delivery on a periodic basis, such monitoring to include but not be limited to activities such as riding on the vehicles during service periods; observance of vehicle appearance; reviewing operations and maintenance records, as well as any other written records relating to the provision of service as described herein; such records shall be maintained and made accessible to San Andreas for a minimum of three (3) years.
- San Andreas may investigate and obtain additional information on accidents/ incidents described herein.

### **SAN ANDREAS RESPONSIBILITIES**

San Andreas shall have an assigned Primary Contact Person, currently either the the Transportation Resource Specialist. This Contact Person shall have the authority to act as San Andreas's designee in any operational matters relating to implementation of the Service Agreement and this Service Description. Any Service Agreement negotiations that may be necessary after the award shall be handled by the Executive Director of San Andreas or his/her designee. San Andreas shall make timely payments to the Contractor, in arrears, in accordance with the payment cycle used by San Andreas. Contractor's invoice shall be received in arrears of provision of service on or before the 5th of the month and shall be paid on or before the 15th of the month. Invoices received after the 5th of the month are paid on the 15th of the following month. San Andreas may conduct periodic drivers' training programs on rider behavior management or such other subjects as may be determined to be required by San Andreas, as negotiated with the Contractor. San Andreas shall provide the

Contractor with updated passenger lists, program schedules and other information required to enable Contractor to provide service hereunder. San Andreas may monitor service on a periodic basis, including but not limited to such activities as riding routes, observing vehicles in operation and services provided by drivers and aides, checking vehicle cleanliness and reviewing all records relevant to this Service Description. San Andreas shall verify Contractor's invoices against San Andreas records regarding clients and routes. San Andreas may monitor all incident and accident reports and client ride times and may document any complaints received regarding service.

Proposals may be submitted by for-profit or non-profit corporations.

Board members and employees of San Andreas are prohibited from submitting proposals. Refer to Title 17 regulations, Section 54314 for a complete list of ineligible applicants.

#### Proposal Requirements

1. Appendix A – San Andreas RFP Service Description (from above)
2. Appendix B – Proposal Title Page
3. Appendix C – Financial Statement (please submit in Excel format as well)
4. Resumes, Statement of Qualifications and References including Appendix D – Statement of Obligations.  
Should include
  - a. Evidence that the applicant possesses the organizational skills, education and/or experience necessary to complete a project of the scope for which they are applying.
  - b. List of professional references with name, address, and phone number of at least one person/agency to verify fiscal stability and at least one person/agency to verify program/administrative experience.
  - c. Statement with evidence of ability to work interactively and cooperatively with San Andreas and the diverse population of families with in the San Andreas catchment area.
  - d. Statement of evidence of ability to work within the scope of Title 17 regulations governing vendorization and SARC policies and procedures.
5. Appendix E –
  - a. Estimated Cost Worksheet for per person rate for Transportation Services.
  - b. Proposed Timeline for development of Transportation Services

6. Appendix F - Description of Transportation Services. Please address all areas of the Service Description in Appendix A.

Estimated Service Duration

Transportation Services will begin by January 1, 2017.

Assumptions and Agreements

Proposals will not be returned to the submitter. SARC reserves the right to dismiss any proposal if it does not meet the criteria established in this RFP.

Submission Information

Proposals must be post marked or emailed by **5:00PM on March 1, 2016**.

Please mail proposals to:

Jeffery Darling  
Manager, Resource Department  
San Andreas Regional Center  
P.O. Box 50002  
San Jose, CA 95150-0002

Or email them to Jeffery Darling at: [sadarling@sarc.org](mailto:sadarling@sarc.org)

Proposals that are late or FAXED will not be accepted.

Please use Times New Roman font in 12 point.

Contact Persons For Additional Information or Clarification, including Word and Excel copies of RFP document templates

Jeffery Darling - [sadarling@sarc.org](mailto:sadarling@sarc.org)

Susan Harris - [sasusanh@sarc.org](mailto:sasusanh@sarc.org)

Basis for Award of Contract

Criteria	Percentage	Score
Agency Experience and Background (including Attachment D – Statement of Obligations)	25%	
Fiscal Responsibility (including Attachment C – Financial Statement)	15%	
Budgets (including Attachment E – Estimated Cost Worksheet)	25%	
Proposal Narrative (including Attachment F - Program Design Checklist)	25%	
Interview	10%	



### Anticipated Selection Schedule

- RFP Orientation for Potential Respondents: We will cover all aspects of the RFP including:
  1. Service Hours by Route
  2. Service Miles by Route
  3. Passenger Counts – including number of non-ambulatory passengers.
  4. Service Region: Identify designated stops and program addresses
  5. Program Hours - to ensure that routes meet the program design (in order to support participation goals identified on the IPP)

Tuesday, February 9, 2016,  
2:00-3:00pm  
Room 35  
San Andreas Regional Center  
300 Orchard City Drive, Suite 170  
Campbell, CA 95008

Or: by phone conference: 888-636-3807  
access code: 6778458

To attend the orientation, please RSVP to Susan Harris at [sasusanh@sarc.org](mailto:sasusanh@sarc.org)

1. Initial review period: March 1 to March 7, 2016
2. Announcement of those proposals moving to interview phase: March 7, 2016.
3. RFP Review Committee interview: March 15, 2016, starting at 1:00pm at  
San Andreas Regional Center  
300 Orchard City Drive, Suite 170  
Campbell, CA 95008
4. Notification of selected service provider(s): March 16, 2016
5. Award of contract: March 18, 2016.
6. Transportation Services to begin by April 15, 2016.

# San Andreas Regional Center

## Requests for Proposal Fiscal Year 2015 – 2016

### Appendix A

#### Service Description

San Andreas Regional Center (San Andreas) has identified a resource need for individuals served. **San Andreas may elect to vendor all, part, or none of the projects, depending on:**

- 1. Funding availability as approved by Department of Developmental Services (DDS) and**
- 2. Quality of proposals received.**

Proposals submitted after the indicated timelines will **NOT** be considered.

The Contractor shall furnish labor, vehicles, materials, supplies and special equipment as required to provide the transportation services described herein. Contractor shall be required to provide transportation for San Andreas Regional Center (hereafter, "San Andreas") clients attending programs primarily located in, but not limited to, Santa Clara County. San Andreas is seeking proposals for services in portions of Santa Clara County. Service shall be provided on such days and at such times as are specified by San Andreas, to and/or from locations, for such persons as are specified by the San Andreas Transportation Resource Specialist. Service as described herein shall be provided on the weekdays, Monday through Friday between the hours of 6:00 A.M. and 7:30 P.M. There are holidays, defined by San Andreas service Providers including the Transportation Company, when service will not be required.

#### **REQUIREMENTS FOR TRANSPORTATION SERVICE DELIVERY TO CLIENTS**

Contractor shall keep confidential all client information except that information necessary for the provision of service. All employees shall be reminded that clients' identifications, addresses and characteristics are confidential. Additional information may be released for the protection of health and/or safety of the client or other persons in the vehicle. Scheduled client ride times for passengers shall be no greater than one and a half (1.5) hours long, one-way. Overall passenger ride times shall average one and a half (1.5) hours or less one-way. The family members or care providers of new riders shall be notified by

Contractor of scheduled pick-up and drop-off times, prior to the day on which such new service is to begin. Contractor shall provide daily curb-to-curb delivery of San Andreas clients and assure that an authorized person is present who has accepted responsibility for the delivered person. The family member or care provider at either end of any trip shall have passengers ready to board and be ready to receive each passenger at the delivery destination. Pick up or delivery of a person shall not be more than fifteen minutes earlier than the scheduled time nor fifteen minutes later. The families, care providers, or program staff shall be notified by Contractor when vehicles will be arriving more than fifteen (15) minutes ahead of or behind schedule. Contractor shall attempt to pick up for three (3) consecutive days any person who is absent without prior notification. Contractor will notify weekly San Andreas' Transportation Resource Specialist of passengers absent without notification for more than three consecutive days. The seat belts of any person aboard shall be fastened when the vehicle is in motion or its motor is running. It is the driver's responsibility to ensure that seat belts are fastened after seating the passengers.

### **HEALTH/SAFETY OF PASSENGERS**

It is the responsibility of the Contractor to maintain health and safety on all vehicles serving San Andreas. Contractor shall verbally report any incidents of misconduct to San Andreas Transportation Resource Specialist within twenty-four (24) hours of the incident. Misconduct is generally defined as behavior on the vehicle that compromises the safety or ride quality of the passengers or the driver. However, if the incident involves an injury or accident, the Contractor shall report it on the day of the incident as required by "Reporting Requirements", followed by a written report as required by the same Paragraph. This reporting will follow standard Special Incident Report (SIR) procedures as defined on the San Andreas website at:

<http://www.sanandreasregional.org/special-incident-reporting/>. The Contractor may refuse to transport a person only if the transportation poses a threat to his/her health or safety or that of the driver, transportation aide or other passenger. The Contractor shall, within one (1) working day following the refusal to transport such persons, notify and discuss the problem with San Andreas. The Contractor shall, within five working days following the refusal to transport, submit a written explanation of the refusal. All such incidents will be investigated by San Andreas and the Contractor and a detailed report prepared specifying any necessary corrective action. The Contractor shall permit San Andreas staff to ride a vehicle at any time for purposes of monitoring, evaluating and/or treating passenger behavior. Contractor shall support the bus driver(s) in implementing



procedures for managing behavior on the bus that will maintain the welfare and safety of all passengers, including the driver. Contractor will adhere to limiting the number of clients carried in current vehicles to the design capacity of the vehicles.

### **REQUIREMENT OF RESPONSIBILITY**

All passengers must be released only to the custody of a responsible adult unless Contractor receives authorization in writing that the client may be left unsupervised. In the event a claim, suit or other legal proceeding is filed on account of leaving alone a person unsupervised, the Contractor shall defend and indemnify San Andreas, its agents, employees, officers and directors against such claim, suit or legal proceeding and shall be liable for all costs of defending the same and for the payment of any settlement, judgment or award resulting therefrom. Contractor shall establish procedures for the immediate handling of those cases where there is no responsible adult available to receive a disembarking passenger. These procedures shall be subject to San Andreas review and approval. San Andreas shall assist in working with families and care providers who fail repeatedly to provide responsible and timely adult assistance and escort of persons to and at pick-up and delivery points.

### **ROUTING AND SCHEDULING**

The routes shall be designed by the Contractor in accordance with the schedule information provided by the San Andreas Transportation Resource Specialist. Contractor shall assure that persons will be picked up within a window of 30 minutes (15 minutes either side of the designated pick up time) and delivered to their destinations within 15 minutes of the requested arrival time. Similarly, Contractor shall pick up passengers at the requested place and time and deliver them to the designated drop-off places within a window of 30 minutes (15 minutes either side of the designated drop-off time). Drivers are to wait for passengers for a maximum of five (5) minutes after the scheduled pickup time before proceeding on route. Routes shall not be accepted by San Andreas which have an average ride time in excess of one and a half (1.5) hours. No passenger shall experience a ride time in excess of one and a half (1.5) hours. The Contractor shall provide a telephone number which parents, care providers or guardians must call prior to 6:00 A.M. to indicate that a client will not be using the bus on that day. The Contractor shall assist San Andreas in maintaining accurate information about routes and provide corrections to the San Andreas transportation database as may be necessary. Transportation Service Providers are required to maintain Internet access including an e-mail address capable of accepting data downloads and for transmitting data

to San Andreas. Service Providers are required to collect attendance data on a daily basis for all trips provided. This data must be transmitted monthly to San Andreas within 5 days of the close of the month. During the startup phase of the transportation service, Contractor will be prepared to work closely with the San Andreas Transportation Resource Specialist to develop a system of electronic data transfer with a mutually compatible data program and compatible data conventions. This shall continue throughout the duration of the contract. Upon award of contract, San Andreas shall provide the Contractor with the most up to date information available from the Transportation Service Request Form. An updated list of contact persons at each program site and destination addresses and program hours shall also be provided at this time. Thereafter, San Andreas shall provide updated information on individual Transportation Service Request Forms, as such changes occur. At least ten (10) working days prior to the date that Contractor begins rendering services under the Service Agreement, Contractor shall provide San Andreas with a copy of the routes so established. Thereafter, a copy of the routes showing changes shall be made available to San Andreas upon request. Such changes shall be made on routes from time to time pursuant to the service request process as described below.

### **SERVICE REQUEST PROCESS**

Contractor shall make changes to routes, as requested in writing by the San Andreas Transportation Resource Specialist, in order to:

- Suspend or delete service the next working day following receipt of notification from San Andreas.
- Add a passenger to a route no later than ten days following notification from San Andreas.
- Add a new program location to a route no later than thirty (30) days following notification from San Andreas.
- Delete a program location from a route no later than thirty (30) working days following notification from San Andreas.

Service shall be approved in writing only by San Andreas Transportation Resource Specialist, or other authorized individual. Notification of such changes referred to above may be received only from the Transportation Resource Specialist, or other authorized individual. No payment shall be made for any portion of a monthly invoice submitted in accordance with this Service Description attributable to any service suspended or deleted. No payment shall be made for any rider not authorized to travel by the San Andreas Transportation Resource Specialist as set forth in this Service Description. Increased/decreased service resulting from demographic

changes shall be implemented by the Contractor at the agreed rate, since such increase or decrease is deemed to be an ordinary part of Service Description.

### **CONTRACTOR'S PERSONNEL**

The Contractor shall employ, train and retain the required number of drivers, aides, dispatchers and administrative personnel necessary to provide the required levels of service. All personnel assigned to provide services under the contract with San Andreas shall be subject to the continued approval of San Andreas.

#### **Drivers/Aides**

Drivers employed by the Contractor to provide service to San Andreas shall have and maintain at minimum a valid California Class B (passenger endorsed) driver's license pursuant to Vehicle Code Section 12500 and a medical certificate pursuant to Vehicle Code Section 12804. All drivers and aides driving under this contract shall be at least 21 years old. Contractor shall not employ under this contract any driver who has been convicted of driving under the influence of alcohol or drugs, or reckless driving, or speed contest within the five years preceding and during this employment. San Andreas requires that all drivers/aides be in good physical and mental health at all times while in service of San Andreas. Contractor shall develop and implement a pre-employment screening program satisfactory to San Andreas which shall include a California Department of Motor Vehicles (DMV) check and such screening information shall be in a permanent driver record held by Contractor. Contractor shall provide San Andreas with evidence of driver pre-employment screening and driver DMV checks when requested by San Andreas. Other required pre-employment checks shall include but are not be limited to, a criminal check with the California State Department of Justice to assure that the prospective driver/aide has not been convicted of any State or Federal offense. All drivers/aides shall be well groomed at all times when driving or riding in vehicles in service of San Andreas. Contractor provided identification shall be worn. Drivers/aides shall be assigned to the same route whenever possible. Contractor shall review driver/aide performance at least once each year in order to observe their operating practices. This review shall include, but not be limited to, review of safety practices; conformity to all pertinent safety and operating policies, regulations and laws; adherence to established routes and schedules; interpersonal and physical management of passengers; proper wheel chair lift and tie down procedures; sensitivity training; training in understanding disability types; other factors involved in the provision of transportation service for individuals with developmental disabilities

(e.g., communications with parents, staff of day programs, maintaining accurate route lists, etc.). All drivers/aides assigned to perform San Andreas services shall maintain a minimum overall rating of "satisfactory". Use of drugs, alcohol, and tobacco while in a vehicle in San Andreas use is prohibited. Firearms, knives, and other weapons are prohibited on said vehicles. Drivers/aides shall not stop during routes for meals or food breaks nor shall they offer or give food to San Andreas passengers. Drivers/aides shall adhere to all Contractor developed policies related to absence and tardiness, attitude and conduct toward persons in their care. San Andreas reserves the right to review said policies, procedures and implementation. San Andreas reserves the right to review all pertinent performance records of drivers/aides providing services to San Andreas.

### **Other Personnel**

Contractor shall maintain staff as required for effective management and supervision of the transportation service provided to San Andreas. This shall include the availability of personnel to receive and place telephone calls, monitor the service during the hours passengers are being transported, and respond to emergencies promptly.

### **USE OF AIDES**

San Andreas shall authorize and pay for the use of aides on a route-by-route basis. No aide hours may be charged to San Andreas without prior written consent from San Andreas Transportation Resource Specialist. The continued use of aides shall be periodically reviewed by San Andreas to determine whether there may be alternatives to such use of aides on given vehicles/routes.

### **DRIVER/AIDE ORIENTATION**

All drivers/aides shall attend driver/aide orientations presented by Contractor which shall include but not be limited to, instruction concerning passenger management on the vehicle; dealing with parents and care providers; procedures for reporting incidents and accidents; procedures for reporting late service; drivers reporting themselves lost and other related service problems, with emphasis on communicating with head office. Participation in such programs shall be documented and included as part of each driver's personnel record. Said driver/aide orientations shall be of sufficient duration to ensure that the driver/aide is prepared to perform his/her duties safely and efficiently. Evidence shall be maintained of driver orientation prior to a driver's performing service as required under this Service Description. In addition, evidence shall be maintained of completion of training by all aides regarding types of disabilities and potential passenger



behavior issues. All costs for driver/aide orientation shall be borne by the Contractor.

### **DRIVER SAFETY PROGRAM**

Contractor shall plan and implement an ongoing safety program in a format satisfactory to San Andreas and shall provide qualified instructors to conduct the program. The cost of the safety program shall be borne by Contractor. The scheduled dates and scheduled content of such safety programs shall be submitted to San Andreas at the request of San Andreas. Said program shall include, but not be limited to, first aid instruction, CPR instruction, and instruction in passenger assistance, two-way communication procedures, and safe driving. It is desirable that drivers/aides required to work with handicapped persons have training in lifting techniques and treatment of wheelchair clients who must be lifted. All such personnel shall be physically capable of performing the required lifting and of operating the equipment provided for this purpose. The Contractor shall assure that each driver/aide has received all training covered by the program, together with regular refresher courses or training in new or improved techniques. Evidence of attendance shall be provided to San Andreas upon request. Drivers/aides shall receive sensitivity training and be trained in passenger assistance techniques for developmentally disabled persons. San Andreas may conduct or may assist the Contractor in conducting such in-service training activities as are deemed appropriate by San Andreas. Evidence of drivers' training programs shall be reflected in the safe operation of vehicles under service to San Andreas. Appropriate San Andreas representatives may monitor standards.

### **CONTRACTOR'S EQUIPMENT**

Before any services are rendered by the Contractor to San Andreas, and at all times during the term of the Agreement with San Andreas, the Contractor shall assure the following:

- Contractor shall supply a sufficient fleet of vehicles to run all routes as regularly scheduled.
- Contractor shall use vehicles with capacities of twenty-five (25) or fewer passengers. San Andreas prefers that all vehicles be lift-equipped in order to accommodate the potential changing needs of the consumers served. Non lift-equipped vehicles may be used for routes with all ambulatory passengers. However, should a passenger's ambulation status change or a non-ambulatory passenger be added to the route, the Contractor will be expected to accommodate the non-ambulatory passenger by providing a lift-equipped vehicle.

- Contractor shall provide and maintain vehicles that meet the requirements of the California Highway Patrol annual terminal inspection (Section 34501 (c), (e), California Vehicle Code).
- Contractor shall routinely provide documentation to San Andreas that vehicles have been inspected annually by the California Highway Patrol, as required, and that any items cited for repair or completion have been satisfactorily addressed. Contractor shall not transport passengers in vehicles that do not meet all federal and state safety standards. At no time during the term of this contract shall the Contractor operate any vehicle that has more than 450,000 miles or is greater than nine (9) model years old. Any vehicle reaching either of these thresholds must be immediately replaced with a vehicle that does not exceed these criteria. However, vehicles may exceed these thresholds upon approval of San Andreas.
- Contractor shall maintain all vehicles in good condition during the term of this Agreement. San Andreas reserves the right to inspect or to ride in, or to have a designated agent inspect or ride in, the vehicles on or off Contractor's premises at any time during the term of this Agreement.
- Contractor shall provide regularly scheduled preventative maintenance for each vehicle assigned to San Andreas transportation service as specified by the vehicle manufacturer and in accordance with State regulations. Documentation of such maintenance on each vehicle shall be made available to San Andreas upon request. All vehicles used by the Contractor shall be kept clean and sanitary and shall have a good exterior and interior appearance during the entire term of the Agreement.
- Contractor shall provide a route identification card, displaying San Andreas route number, to be carried by each vehicle so as to be visible from the outside, while in the service of San Andreas. All vehicles shall have sufficient fuel to complete one A.M. or P.M. route before the boarding of any passenger. No vehicle shall be stopped for refueling with clients on board. All vehicles shall be equipped with first aid kits, fire extinguishers, and CHP approved hazard warning equipment. All vehicles shall be equipped with 2-way radios or other means of voice communications of such range and power that no vehicle is beyond radio communication with its dispatcher during hours of service. Every vehicle shall have enough seats of such size and type as to accommodate comfortably and safely all passengers on its route. Each vehicle shall have adequate heating and air conditioning for passenger and driver well-being.

## **SPECIAL EQUIPMENT REQUIREMENTS**

If during the period of the executed Service Agreement any modification or installation of equipment is required due to a change in the law or applicable rules and regulations, such modification or installation shall be made by the Contractor as required. Costs of such modification, installation, and maintenance shall be borne by the Contractor. In all vehicles, seat belts and wheelchair tie-downs of sufficient number and quality shall be installed so that all passengers in wheelchairs may be adequately secured during transport and each ambulatory client has access to a correctly installed seat belt.

Wheelchair restraints shall provide the maximum restraint possible and shall be fastened in a manner that does not damage the chair.

Contractor shall provide this equipment, at Contractor's own expense. Shoulder harnesses or other restraining devices that may be requested in writing by San Andreas, due to the nature of a particular person's handicapping condition, San Andreas shall bear the costs of such devices. Wheelchair accessible vehicles shall be provided by Contractor as required to safely transport passengers needing such vehicles, at Contractor's own expense. Wheelchair ramps, their location on the vehicle, mechanically or electrically operated lifts, if used, and wheelchair securement within the vehicles shall be in accordance with applicable State and Federal regulations, and shall be provided by the Contractor, at the Contractor's own expense. Contractor shall not use on any route a vehicle that does not contain all required special equipment. All passenger seats in vehicles operated for San Andreas clients must accommodate adult passengers and not be School bus type seats.

## **CONTRACTOR'S FACILITIES AND LOCATION OF EQUIPMENT**

Contractor shall maintain adequate and secure administrative, maintenance, and parking facilities as central to the area of operation as possible. Vehicles used in service of San Andreas shall be night parked to provide most efficient and secure transportation service.

This may include parking at driver's residences as long as the vehicles are secure. Such plan must be included in the Contractor's proposal if such a method of operation is to be implemented. Contractors should locate operating and maintenance facilities in a location that maximizes the efficiency of the operation. Facilities may be shared with other Contractor operations.

## **SCHEDULED PROGRAM CLOSINGS**

Payment shall be made subject to the reporting required by Section 15 above, and shall be for authorized and verified services. Accordingly,

no payments shall be made for any services reported when day programs or other destinations are scheduled to be closed.

### **REPORTING REQUIREMENTS**

Complete route sheets/driver manifests shall be submitted to San Andreas upon request. Route sheets shall include all routes providing service under this agreement, including those of any and all subcontractors. Route sheets shall include:

- Route number, indicating A.M. or P.M.
- Client name;
- Pick-up address;
- Scheduled pick-up time;
- Drop-off address;
- Scheduled drop-off time;
- Wheelchair route noted;
- Aide route noted

Accompanying route sheets, Contractor shall submit to San Andreas upon request a listing of all passengers transported under this Agreement identifying the client name, address, destination, route number(s) and time of pick up or drop off. Vehicle information shall be submitted within five (5) days prior to the start of the contract with the route sheets. Contractor shall complete a vehicle inventory form identifying every vehicle in use under this Agreement, including any vehicles in use by any subcontractors. Vehicle information shall be provided including license number, make, model, size, year, fuel type, mileage and related information on each vehicle. This information will be updated yearly. All accidents/incidents that involve San Andreas's passengers and Contractor's equipment or personnel shall be reported to San Andreas using the Agency's Special Incident Report (SIR) as follows:

- Accidents/incidents involving injuries shall be reported on the same day to the San Andreas
- Transportation Department immediately after the Contractor receives notification of same.
- San Andreas will assist in training regarding this incident reporting procedure to the Contractor.
- A further written report which includes all pertinent information shall be provided by the Contractor as soon as is reasonably possible after each accident/ incident, whether or not an injury is involved, but in no event later than three (3) working days after the accident/incident.
- Contractor shall provide any additional information concerning the accident/incident as may be requested by San Andreas.



## **MONITORING AND INVESTIGATION**

San Andreas reserves the right to monitor the Contractor's performance as described within this Service Description, including but not limited to the following areas:

- San Andreas may monitor ride times to ensure that the system average ride times are within the limits.
- San Andreas may monitor service delivery on a periodic basis, such monitoring to include but not be limited to activities such as riding on the vehicles during service periods; observance of vehicle appearance; reviewing operations and maintenance records, as well as any other written records relating to the provision of service as described herein; such records shall be maintained and made accessible to San Andreas for a minimum of three (3) years.
- San Andreas may investigate and obtain additional information on accidents/ incidents described herein.

## **SAN ANDREAS RESPONSIBILITIES**

San Andreas shall have an assigned Primary Contact Person, currently either the the Transportation Resource Specialist. This Contact Person shall have the authority to act as San Andreas's designee in any operational matters relating to implementation of the Service Agreement and this Service Description. Any Service Agreement negotiations that may be necessary after the award shall be handled by the Executive Director of San Andreas or his/her designee. San Andreas shall make timely payments to the Contractor, in arrears, in accordance with the payment cycle used by San Andreas. Contractor's invoice shall be received in arrears of provision of service on or before the 5th of the month and shall be paid on or before the 15th of the month. Invoices received after the 5th of the month are paid on the 15th of the following month. San Andreas may conduct periodic drivers' training programs on rider behavior management or such other subjects as may be determined to be required by San Andreas, as negotiated with the Contractor. San Andreas shall provide the Contractor with updated passenger lists, program schedules and other information required to enable Contractor to provide service hereunder. San Andreas may monitor service on a periodic basis, including but not limited to such activities as riding routes, observing vehicles in operation and services provided by drivers and aides, checking vehicle cleanliness and reviewing all records relevant to this Service Description. San Andreas shall verify Contractor's invoices against San Andreas records regarding clients and routes. San Andreas may monitor all incident and accident reports and client ride times and may document any complaints received regarding service.

Board members and employees of regional centers are prohibited from submitting proposals. Refer to Title 17 regulations, Section 54314 for a complete list of ineligible applicants.

## Appendix B

### **RFP TITLE PAGE** **Request for Proposal – Fiscal Year 2015 – 2016**

TO: Selection Committee

Please place a copy of  
Attachment B on the top of  
the original and each of the  
(insert number here) copies.

San Andreas Regional Center  
300 Orchard City Drive  
Campbell, CA. 95008  
ATTENTION: (insert name of Resource District Manager)

---

Program Title (Please Print)

---

Name of Individual or Organization Submitting Proposal (Please Print)

---

Address of Individual or Organization Submitting Proposal (Please Print)

---

Signature of Person Authorized to Bind Organization

---

Contact Person for Project (Please Print)

---

Telephone Number of Contact Person

---

Fax Number of Contact Person

---

Email Address of Contact Person

---

Name of Parent Corporations (If Applicable) (Please Print)

---

Applicant or Organization Contact Person:

---

Author of Proposal if Different from Individual Submitting Proposal

## Appendix C

### FINANCIAL STATEMENT

All respondents must complete this statement for last complete fiscal year and current fiscal year to date. Please also supply a copy of this document in Excel format.

#### **CURRENT ASSETS**

Cash in Bank	
Accounts Receivable	
Notes Receivable	
Equipment / Vehicles	
Inventory	
Deposits/ Prepaid Expenses	
Life Insurance ( Cash Value)	
Investment Securities	
<b>TOTAL CURRENT ASSETS =</b>	

#### **FIXED ASSETS**

Buildings and /or Structures	
Long Term Investments	
Potential Judgements and Liens	
<b>TOTAL FIXED ASSETS =</b>	
<b>TOTAL CURRENT AND FIXED ASSETS =</b>	

#### **CURRENT LIABILITIES**

Accounts Payable	
Notes Payable	
Taxes Payable	
<b>TOTAL CURRENT LIABILITIES =</b>	

#### **LONG TERM LIABILITIES**

Notes / Contracts	
Real Estate Mortgages	
<b>TOTAL LONG TERM LIABILITIES =</b>	

**TOTAL CURRENT AND LONG TERM LIABILITIES =**

**Equity =**

**TOTAL LIABILITES AND EQUITY =**

#### **OTHER INCOME - Revenue from other Sources**

(Specify)

#### **LINE OF CREDIT**

Amount Available



## Appendix D

### STATEMENT OF OBLIGATIONS

All applicants must complete this statement.

- A. 1. Is the applicant currently providing services to people with developmental disabilities?  
[ ] No [ ] Yes  
If **Yes**, indicate the following:  
Name: \_\_\_\_\_  
Location: \_\_\_\_\_  
Type of Service \_\_\_\_\_  
Capacity \_\_\_\_\_
2. Is the applicant currently providing related services to people other than those with developmental disabilities?  
[ ] No [ ] Yes  
If **Yes**, indicate the following:  
Name: \_\_\_\_\_  
Location: \_\_\_\_\_  
Type of Service \_\_\_\_\_  
Capacity \_\_\_\_\_
- B. 1. Is the applicant currently receiving grant(s)/funds from any source to develop services for people with developmental disabilities?  
[ ] No [ ] Yes  
If **Yes**, indicate the following:  
Funding Source \_\_\_\_\_  
Scope of Grant Project \_\_\_\_\_
2. Is the applicant currently applying for grant(s)/funds from any source to develop services for Fiscal Year 20?? – 20?? ?  
[ ] No [ ] Yes  
If **Yes**, indicate the following:  
Funding Source \_\_\_\_\_  
Scope of Grant Project \_\_\_\_\_
- C. Is the applicant planning to expand existing services (through a Letter of Intent and with or without grant funds) from a source other than San Andreas Regional Center during Fiscal Year 20?? – 20?? ?  
[ ] No [ ] Yes

If **Yes**, provide details:

---

---

---

- D. Describe other professional / business obligations. Include the following:

Name: 

---

Location: 

---

Type of Service 

---

Capacity 

---

- E. Has the applicant, or any member of the applicant's organization, received a Corrective Action Plan (CAP), Sanction, a Notice of Immediate Danger, an A or B Citations or any other citation from a Regional Center or state licensing agency?

☐ No ☐ Yes

If **Yes**, explain in detail:

---

---

---

- F. Has the applicant, or any member or staff of the applicant's organization, ever received a citation from any agency for abuse?

☐ No ☐ Yes

If **Yes**, explain in detail:

---

---

---

---

Signature of Applicant or Authorized Representative

---

Date

## Appendix E

### ESTIMATED COST WORKSHEET

All applicants must submit a cost worksheet. Cost Worksheets in other formats will be considered with prior approval by San Andreas.

<b>Staff and Administrative Costs</b>	
Staff Salaries and Wages: Specify details- attach details if needed	\$
Staff Benefits including Workman's Compensation: Specify details- attach details if needed	\$
Administrative Overhead	\$
Program Consultant Fees	\$
Staff Training Costs	\$
Travel Expenses	\$
<b>Business/ Office Related Costs</b>	
Communication Costs	\$
Office Supplies	\$
Office Equipment/ Rental & Maintenance Costs and Supplies	\$
<b>Building and Facility Program Related Costs*</b>	
Space Costs-Rental or lease	\$
Utilities Costs	\$
Insurance Costs	\$
Fire Safety Costs/Maintenance	\$
Facility Maintenance	\$
<b>Specific Training Costs: Specify</b>	
	\$
<b>Other Costs: Specify</b>	
	\$
<b>TOTAL MONTHLY COSTS</b>	
	\$

If necessary, adjust the above schedule to your program needs but address requested line items. If the cost is not applicable to your program, please state N/A and provide reasons for its being not applicable.

In addition to the projected cost for each line item, be sure to include a detailed breakdown/description of how each line item total was arrived at. Additional schedules may be submitted for this purpose.

This information is being requested for the purposes of ensuring that potential vendors have fully considered estimates on all possible costs that might arise in the development and/or operation of this program. It will also be used by the RFP Review Committee to determine reasonable reimbursement amounts for the service(s).

## **Appendix F**

### **DESCRIPTION OF TRANSPORTATION SERVICES**

Describe how your company will provide Transportation Services. Be sure to address all areas outlined in the Service Description in Appendix A.