REQUEST FOR PROPOSALS

Salesforce Consulting Services for Transportation Demand Management

Introduction

The Atlanta Regional Commission’s (ARC) Mobility Services Group is seeking proposals from firms or teams of firms to provide transportation demand management (TDM) specific Salesforce consulting services for the Atlanta Regional TDM Program.

The Atlanta Regional TDM Program, which is managed by ARC, consists of Georgia Commute Options (GCO)\(^1\), the 20-county regional TDM provider, and seven Transportation Management Associations (TMA) that provide TDM services in specific employment centers near the core of the region\(^2\). Collectively, these eight TDM service providers are referred to as employer service organizations (ESOs). Among other things, the ESOs work with employers and property managers within their geographic territories, providing them with commute options programs and services focused on reducing single occupancy vehicle (SOV) trips, with an emphasis on commute trips.

The employers and property managers who work with the ESOs, receiving TDM services and information, are referred to as “partners,” with companies that are being targeted for outreach but do not yet regularly interact with the TDM program being referred to as “prospects.” Currently, activities and progress related to TDM outreach at these partner and prospect sites are tracked through Salesforce, which functions as the program’s customer relationship management (CRM) software. Among other things, Salesforce is used to track:

- Account information for each employer/property manager
- Contact information for each employer/property manager
- Detailed information about the commute options program for each employer/property manager
- Events held at employer/property manager sites
- Meetings conducted with employer/property managers
- Mode Counts conducted for employer partners, which detail the use of alternative commute modes

\(^1\) Interested parties can find information related to the Georgia Commute Options program by visiting [http://www.gacommuteoptions.com](http://www.gacommuteoptions.com).

\(^2\) The seven TMAs are: Downtown Connects operating in downtown Atlanta; Midtown Transportation operating in midtown Atlanta; Livable Buckhead operating in Atlanta’s Buckhead neighborhood; Perimeter Connects operating in the perimeter center area; Atlantic Station Access and Mobility Program (ASAP+), operating in Atlanta Station; Aero, operating at Hartsfield-Jackson International Airport; and Clifton Corridor Transportation Management Association operating in and around the Clifton Road corridor, by Emory University. Information regarding the seven TMAs can be found here: [eso.atlantaregional.com](http://eso.atlantaregional.com)
Survey results that are used to populate aspects of employer mode counts

Currently, GCO and the seven TMAs all share a single instance of Salesforce, in which each organization has access only to their own information, unless they choose to share it with the other organizations. The entirety of the Atlanta Regional TDM Program is managed by The Atlanta Regional Commission (ARC), and it is ARC who acts as administrator – and user – to this shared CRM account.

ARC intends to award a contract to one consultant or a team of consultants, who will provide the Salesforce-related services described in Exhibit A, with direct oversight by ARC staff.

ARC intends to award a contract through the end of the calendar year 2021, with the option of two one-year renewals. Each contract year will include an updated scope and work plan for work to begin in August 1, 2020 and conclude by December 31, 2021. It is anticipated that available funds for the project will be approximately $80,000 annually, or $113,000 for the intended contract period through December 31, 2021. ARC reserves the right to award all or part of the available funds for this project.

The funding for this work is provided through a federal-aid program, Congestion Mitigation and Air Quality (CMAQ) and state matching funds provided by the Georgia Department of Transportation. Applicants interested in providing services described in this request must comply with the requirements described herein and requirements governing the use of CMAQ funds. All documentation associated with CMAQ funding must be retained by the Awardee for seven (7) years without exception.

Please note that contract award for this work is contingent upon ARC receiving adequate funding for this purpose from the Georgia Department of Transportation (GDOT).

Proposal Requirements & Timeline

All dates are tentative, provided for planning purposes, and subject to change. ARC anticipates that a contract will be awarded in July 2020. All work activities must be completed by December 31, 2021. The successful firm or team of firms should be prepared to begin work on August 1, 2020.

Proposals must include the following information:

1. Name of the lead firm and any sub-consultants.
2. The point of contact (name, title, phone number, mailing address, and email address) at the lead firm.
3. Description of relevant experience on projects of this type.
4. Qualifications and technical competence of consultant/or sub-consultants in the type of work required.
5. Description of experience on similar projects including a list of at least three references within the past five years, with current contact information.
6. Listing of key project personnel and their qualifications and roles related to the project.
7. The geographic location of the consultant’s office performing the work.
8. A detailed description of the technical approach proposed for the accomplishment of the work described in Exhibit A.
9. A proposed schedule and work plan for the accomplishment of the work described in Exhibit A. The work plan should include estimated hours by category for each task identified in Exhibit A. Use the format at Exhibit B-1 for the estimated hours per task.
10. A proposed project budget in the format of Exhibits B and B-1 to this RFP.
11. A DBE Utilization Plan in the format at Exhibit C.
12. Provide your firm(s) latest financial statements or audited financial statements
13. Any other pertinent information.

The review of written proposals and interviews will be based on the following evaluation criteria, with the relative weights in parentheses:

1. Related experience, qualifications, and references of the firm or project team (40%)
2. Technical approach (40%)
3. Work plan and schedule (10%)
4. Proposed budget (10%)

If your firm does not wish to propose on the project, please notify ARC as soon as possible. A negative response will not prejudice the consideration of your firm in competition for future ARC contracts. However, failure to respond either positively or negatively will be considered a lack of interest and your firm’s name may be deleted from the agency’s prospective consultant file.

It is the policy of ARC that Disadvantaged Business Enterprises (DBEs) (49 CFR Part 26) have the maximum opportunity to participate, either as contractors or as subcontractors, in the performance of Commission contracts to the extent practical and consistent with the efficient performance of the contract. ARC’s current DBE goal is 17.61%. Information regarding ARC’s DBE Program can be found at www.atlantaregional.com/about-us/business-opportunities.

Additional information should not be required to respond to this RFP. However, questions should be submitted in writing to Casey Sloan no later than 5:00 pm on Friday, June 5, 2020. Questions should emailed to the email address below to csloan@atlantaregional.com. All questions received, and responses to those questions will be posted on the ARC website by 5:00 pm on Wednesday, June 10, 2020.

Interested firms must notify ARC by 5:00pm on Friday, June 19, 2020 if they intend to submit a proposal. ARC will email each interested firm or team of firms individually a link to a secure and confidential portal to upload the proposal. Interested firms should email Casey Sloan at csloan@atlantaregional.org by 5:00 Friday, June 19, 2020 to receive the link to the portal.
ARC must receive one (1) hard copy and one (1) copy through the secure and confidential portal set up from each interested firm, either in Microsoft Word or PDF format, no later than Noon ET on Friday, June 26, 2020.

Proposals shall not exceed a total of 25 pages (8.5 x 11, front and back of sheet counted as two pages), inclusive of resumes and firm experience. Covers, end sheets, and an introductory letter shall not count against this maximum. Font size shall be a minimum of 11 point in all cases.

Proposals must be submitted to the following address:
Atlanta Regional Commission
ATTN: Casey Sloan
229 Peachtree Street NE, Ste 100, Atlanta, Georgia 30303

If interviews are necessary, the short-listed firms will be invited to participate in an interview process with an evaluation committee, to be scheduled the week of July 13, 2020. ARC will confirm a specific interview date and time with short-listed firms by the week of July 6, 2020. ARC reserves the right to award this contract based on initial proposals received without formal interviews and to award all or part of this project to one or more firms.

**SUMMARY TIMELINE**

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
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</thead>
<tbody>
<tr>
<td>RFP posted</td>
<td>Wednesday, May 27, 2020</td>
</tr>
<tr>
<td>Questions Due</td>
<td>Friday, June 5, 2020</td>
</tr>
<tr>
<td>Question and Answers Posted online</td>
<td>Wednesday, June 10, 2020</td>
</tr>
<tr>
<td>Proposals due</td>
<td>Friday, June 26, 2020</td>
</tr>
<tr>
<td>Interviews conducted</td>
<td>The week of July 13, 2020</td>
</tr>
<tr>
<td>Contract awarded</td>
<td>Late July 2020</td>
</tr>
<tr>
<td>Work Start Date</td>
<td>August 1, 2020</td>
</tr>
<tr>
<td>Work completed (Year 1)</td>
<td>December 31, 2021</td>
</tr>
</tbody>
</table>

Applicants interested in providing services described in this request must comply with the requirements described herein and requirements governing the use of CMAQ funds. All documentation associated with CMAQ funding must be retained by the Awardee for seven (7) years without exception.

**RESTRICTION OF COMMUNICATION**

From the date of the advertisement of the solicitation through contract award and selection is announced, respondents are not allowed to communicate about this solicitation or scope with any staff of ARC, except for submission of questions as instructed in the RFP or as provided by any existing work agreement(s). In the case of violation of this provision, ARC reserves to right to reject the submittal of the offending respondent.
EXHIBIT A
EMPLOYER SERVICES PROGRAM
PROPOSED SCOPE OF WORK

The respondent should provide a detailed description of the technical approach proposed for the accomplishment of all tasks listed below, which should be based on the respondent’s experience with similar project and/or knowledge of relevant best practices.

Task 1: Salesforce Platform and Licensing Provision

The goal of this task is to provide licensing and access to a single Salesforce platform for the various organizations and individuals that constitute the Atlanta Regional TDM Program. The platform should:

- Allow users to track TDM-specific information about the employer and property manager partners and prospects that make up their accounts. Please refer to Exhibit D for a list of the types of TDM-specific information that will need to be tracked to determine the level of engagement of each partner. The “engagement level” of each partner will also need to be tracked and should be automatically calculated based on several specific fields.
- Allow users to track TDM-specific events and meetings, associating these with specific employer or property manager accounts. It is important to track interactions with partners, especially since these interactions are used to demonstrate work done by the ESOs to increase the level of engagement of their partners. Additionally, users should be able to track progress with their prospect accounts as it relates to converting those prospects into partners.
- Allow users to upload survey results into Salesforce for the purpose of creating or updating a “mode count” for their employer partners. Mode counts demonstrate the commute behavior of the employees at each employer partner, showing the frequency of use of each type of commute mode. They are used, along with other data points associated with accounts, to calculate TDM outputs such as vehicle miles reduced (VMT) and emissions reduction.
- Allow privacy for each ESO, so that only the users associated with each ESO can see the information specific to that ESO. If desired, ESOs should be able to share their information with others. ARC, who will act as administrator on the platform, should have full access to all information.
- Allow users to easily create and share dashboards and reports.
- Allow for ARC to create a link between accounts in Salesforce and employers in Agile Mile, which is the Atlanta Regional TDM Program’s ridematching database that provides commuter trip planning, carpool and vanpool ridematching, and incentives to encourage
clean commutes and behavior change. At a minimum, this should entail providing a unique ID for each account that can be matched to the Agile Mile SQL database.

The respondent should indicate licensing costs per license as well as any anticipated development costs.

**Task 2: Platform Training and Additional Support Services**

The goal of this task is to provide initial and on-going training for all Atlanta Regional TDM Program Salesforce platform users, as well as on-going support services for users. This includes, but is not limited to:

- Designing and leading an initial in-person training on the structure and functionality of the Atlanta Regional TDM Salesforce platform for all users.
- Designing and leading in-person trainings on a recurring basis, both to give an introductory training for new hires and to address specific questions or concerns of users.
- Creating a set of training materials, such as standard operating procedures (SOPs) or instructional videos, that outline the structure and functionality of the platform and can be accessed by all platform users at any time.
- Offering support services for users who are having trouble or issues with the platform.
- Making changes or updates to the platform as needed by ARC. These changes may include creating additional objects and/or fields or automating fields based on a desired set of criteria.

The respondent should indicate the cost of the various sub-tasks based on hourly rates where applicable.
EXHIBIT B
Proposed Project Budget – Calendar Year 2020/2021

<table>
<thead>
<tr>
<th></th>
<th>Direct Labor</th>
<th>Estimated Hours</th>
<th>Rate/Hour</th>
<th>Total Est. Cost</th>
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<tbody>
<tr>
<td></td>
<td>(List by position all professional personnel participating in the project)</td>
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<td></td>
<td>Total Direct Labor</td>
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<td><strong>Total Overhead</strong></td>
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<td></td>
<td>Overhead Cost</td>
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<td>(2 CFR Part 225 and A-122)</td>
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<td></td>
<td>(Overhead percentage rate) X (Total Direct Labor)</td>
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<td></td>
<td>Total Other Direct Costs</td>
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<td></td>
<td>Other Direct Costs</td>
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<td>(List other items and basis for computing cost for each. Examples include computer services, equipment, etc.)</td>
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<td>Total Subcontracts</td>
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<td>Subcontracts</td>
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<td></td>
<td>(For each, list identity, purpose and rate)</td>
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<td>Total Subcontracts</td>
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<td>Travel</td>
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<td>(Travel within the 20 county maintenance and 7 county nonattainment area.)</td>
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<td>(List # of days x rate)</td>
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<td>Total Travel</td>
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<td>(List # of days x rate)</td>
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<td>Total Estimated Cost and Profit</td>
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<td></td>
<td>Profit</td>
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<td></td>
<td>(Percentage rate X basis)</td>
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<td></td>
<td>Total Profit</td>
<td></td>
<td></td>
<td>$_______</td>
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</table>
## Proposed Project Budget by Task – 2020/2021

<table>
<thead>
<tr>
<th>Task</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task 1: Salesforce Platform and Licensing Provision</td>
<td></td>
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<tr>
<td>Task 2: Platform Training and Additional Support Services</td>
<td></td>
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<tr>
<td><strong>TOTAL</strong></td>
<td></td>
</tr>
</tbody>
</table>
### EXHIBIT B-2
**Calendar Year 2022**
**Proposed Project Budget (Position & Rates Only)**

1. **Direct Labor**  
   (List by position all professional personnel participating in project)  
   Rate/Hour  
   $________

2. **Overhead Cost** (2 CFR Part 225 and A-122)  
   (Overhead percentage rate)  
   $________

3. **Other Direct Costs** (List other items and basis for computing cost for each. Examples include computer services, equipment, etc.)  
   **Total Other Direct Costs**  
   $________

4. **Subcontracts** (For each, list identity, purpose and rate)  
   **Total Subcontracts**  
   $________

5. **Travel**  
   (Travel within the 20 county maintenance and 7 county nonattainment area.)  
   (List # of days x rate)  
   **Total Travel**  
   $________

6. **Profit** (Percentage rate X basis)  
   $________
   **Total Profit**  
   $________
   **Total Estimated Cost and Profit**  
   $________
EXHIBIT B-3  
Year 2023  
Proposed Project Budget (Position & Rates Only) 

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
<th>Amount</th>
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<tbody>
<tr>
<td>1</td>
<td>Direct Labor (List by position all professional personnel participating in project)</td>
<td>$_____</td>
</tr>
<tr>
<td>2</td>
<td>Overhead Cost (2 CFR Part 225 and A-122) (Overhead percentage rate)</td>
<td>$_____</td>
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<tr>
<td>3</td>
<td>Other Direct Costs (List other items and basis for computing cost for each. Examples include computer services, equipment, etc.)</td>
<td>$_____</td>
</tr>
<tr>
<td></td>
<td><strong>Total Other Direct Costs</strong></td>
<td>$_____</td>
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<tr>
<td>4</td>
<td>Subcontracts (For each, list identity, purpose and rate)</td>
<td>$_____</td>
</tr>
<tr>
<td></td>
<td><strong>Total Subcontracts</strong></td>
<td>$_____</td>
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<td>5</td>
<td>Travel (Travel within the 20 county maintenance and 7 county nonattainment area.) (List # of days x rate)</td>
<td>$_____</td>
</tr>
<tr>
<td>6</td>
<td>Profit (Percentage rate X basis)</td>
<td>$_____</td>
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<tr>
<td></td>
<td><strong>Total Profit</strong></td>
<td>$_____</td>
</tr>
<tr>
<td></td>
<td><strong>Total Estimated Cost and Profit</strong></td>
<td>$_____</td>
</tr>
</tbody>
</table>
EXHIBIT C

Title VI and DBE Requirements
For Prime Contractors and Sub-grant Recipients

TITLE VI

ARC, in accordance with Title VI of the Civil Rights Act of 1964, 78 Stat. 252, 42 U.S.C. 2000D to 2000D4, and Title 49, Code of Federal Regulations, Department of Transportation Subtitle A, Office of the Secretary, Part 21, Nondiscrimination in Federally assisted programs of the Department of Transportation, issued pursuant to such Act, hereby notifies all Respondents that it will affirmatively insure that in any contract entered into pursuant to this advertisement, minority business enterprises shall be afforded full opportunity to submit proposals in response to this invitation and shall not be discriminated against on the grounds of race, color, sex, handicap, or national origin in consideration for an award.

DISADVANTAGED BUSINESS ENTERPRISE (DBE) PARTICIPATION

Overall DBE Goal: As part of its DBE Plan, ARC has an established overall goal of 17.61 percent.

Program Intent. ARC has established a Disadvantaged Business Enterprise (DBE) program in accordance with regulations of the U.S. Department of Transportation (DOT), 49 CFR Part 26 ("Part 26" or "DBE Regulations"). ARC has received federal financial assistance from the Department of Transportation for this contract opportunity, and as a condition of receiving this assistance, ARC has signed an assurance that it will comply with Part 26.

It is the policy of ARC to ensure that DBEs, as defined in Part 26, have an equal opportunity to participate in its DOT-assisted contracting opportunities. It is also ARC’s policy:

(a) To ensure nondiscrimination in the award and administration of DOT-assisted contracts in the Department's highway, transit, and airport financial assistance programs;
(b) To create a level playing field on which DBEs can compete fairly for DOT-assisted contracts;
(c) To ensure that the Department's DBE program is narrowly tailored in accordance with applicable law;
(d) To ensure that only firms that fully meet this part's eligibility standards are permitted to participate as DBEs;
(e) To help remove barriers to the participation of DBEs in DOT-assisted contracts; and
(f) To assist the development of firms that can compete successfully in the marketplace outside the DBE program.

Definitions. Disadvantaged Business Enterprise (DBE) as used in this Contract shall have the same meaning as defined in 49 CFR Part 26. A DBE is a firm in which one or more individuals who are women or eligible minorities own and control at least 51% of the firm.

Compliance. All Bidders/Proposers, potential contractors, or subcontractors for this Contract are hereby notified that failure to carry out the policy and the DBE obligations, as set forth above, shall
constitute a breach of Contract which may result in termination of the Contract or such other remedy as deemed appropriate by ARC.

**Prompt Payment Requirement.** In the event of contract award, the prime contractor agrees to pay each subcontractor under the prime contract for satisfactory performance of its contract no later than 30 days from the receipt of each payment the prime contract receives from ARC. The prime contractor agrees further to return retainage payments to each subcontractor within 10 days after the subcontractors work is satisfactorily completed. Any delay or postponement of payment from the above referenced time frame may occur only for good cause following written approval of ARC. This clause applies to both DBE and non-DBE subcontracts.

Any contractor found not to be in compliance with this clause will be considered in breach of contract and any further payments will be withheld until corrective action is taken. If contractor does not take corrective action, contractor may be subject to contract termination.

**Substitution.** The Bidder shall make a good faith effort to replace a DBE Subcontractor that is unable to perform successfully with another DBE Subcontractor. Substitution must be coordinated and approved by ARC.

**Documentation.** The Bidder/Proposer shall establish and maintain records and submit regular reports, as required, which will identify and assess progress in achieving DBE subcontract levels and other DBE affirmative action efforts.

Additional information on ARC’s Disadvantaged Business Enterprise Program can be obtained from:

Brittany Zwald, Contract & Grants Officer, Financial Services Group,
Atlanta Regional Commission
229 Peachtree Street NE; Suite 100
Atlanta, GA 30303
470.378.1494
bzwald@atlantaregional.org
**DBE UTILIZATION PLAN** (Complete this form for each DBE firm participating in this proposal. This plan will be included in a Title VI and DBE Attachment to all USDOT funded ARC bids and proposals.

Name of bidder/offeror’s firm: ________________________________

Address: ______________________________________________________________________

City: __________________________________ State: ____  Zip: ______

Name of DBE firm: ________________________________

Address: ______________________________________________________________________

City: __________________________________ State: ____  Zip: ____

Telephone: ___________________________

Description of work to be performed by DBE firm:

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The bidder/offeror is committed to utilizing the above-named DBE firm for the work described above. The estimated dollar value of this work is $_____________.

**Affirmation**

The above-named DBE firm affirms that it will perform the portion of the contract for the estimated dollar value as stated above.

By ____________________________________________

(Signature)

______________________________________________

(Title)

If the bidder/offeror does not receive award of the prime contract, any and all representations in this DBE Utilization Plan shall be null and void.

(submit this page for each DBE subcontractor)

*PLEASE ATTACH A COPY OF THE OFFICIAL DBE CERTIFICATION FORM.*
EXHIBIT D

Engagement Action Types and Measurements for Salesforce

**Distribute**

*Makes employees aware of commute options programs and services by any of the following:*

- Distributing commute options information through electronic means.
- Posting commute options information in common areas.

**Participate**

*Has employees participate in the regional TDM program by any of the following:*

- Participating in regional or local modal promotions.
- Encouraging employees to participate in the GCO incentives program.
- Allowing ESOs to host on-site events.

**Encourage**

*Encourages employees to utilize alternative modes through no/low cost services, including:*

- Offering clean commute tax benefits.
- Working with the ESO to create a carpool or vanpool program.
- Offering an informal telework or flex work program.
- Offering discount transit passes through the ESO.
- Offering additional tailored strategies to promote clean commuting (at no/low cost).

**Invest**

*Invest in alternative mode use through programs and services, including:*

- Offering financial incentives for clean commuting.
- Establishing last-mile shuttle to transit.
- Offering parking cash-out program.
- Offering a formal telework or flex work program.
- Installs on-site secure bike storage and/or provides shared bikes.
- Offering additional tailored strategies to promote clean commuting (at cost).